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DISCLAIMERS

- This presentation represents my unofficial interpretation of the Federal Communication Commission's E-rate rules and regulations. Official guidance can come only from the FCC and the Universal Service Administrative Company (USAC), the nonprofit that handles daily administration of E-rate and other Universal Service programs.
- USAC may update the application portal or the procedures after today's presentation. What I present is correct to the best of my knowledge at the time of the presentation.

FUNDING YEARS & IMPORTANT DATES

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E-RATE FUNDING YEARS

Download latest chart from KDLA E-rate page:
https://kdla.ky.gov/librarians/programs/e-rate/Pages/Funding-Years.aspx

E-rate Funding Years – Dates to Remember

KDLA E-rate support: Lauren Abner lauren.abner@ky.gov or 502-564-1728	Application Process			Recurring Services		Non-Recurring Services	
	Form 470 – Competitive Bidding	Form 471 – Application to Request Discounts	Form 486 – Service Start Date + CIPA Certification	Service Dates for Category One or Two	Invoicing Deadline (BEAR/472)	Service Dates for Category Two Purchase/ Installation	Invoicing Deadline (BEAR/472)
Funding Year 2018 (FY 2018-19)	Closed	Closed	120 days from: FCDL *or* Service Start Date (whichever is later)	**July 1, 2018 to June 30, 2019**	October 28, 2019	April 1, 2018 to Sept. 30, 2019	January 28, 2020
Funding Year 2019 (FY 2019-20)	Closed	Closed	120 days from: FCDL *or* Service Start Date (whichever is later)	**July 1, 2019 to June 30, 2020**	October 28, 2020	April 1, 2019 to Sept. 30, 2020	January 28, 2021
Funding Year 2020 (FY 2020-21)	**July 1, 2019 to February 2020** Estimated dates to open bidding	**Mid-January to Mid-March 2020** Estimated Form 471 filing window	120 days from: FCDL *or* Service Start Date (whichever is later)	**July 1, 2020 to June 30, 2021**	October 28, 2021	April 1, 2020 to Sept. 30, 2021 **See note below	January 28, 2022
Notes	Most libraries open competitive bidding each year and must wait at least 28 calendar days to select vendor(s).	All libraries must file the Form 471 every year to receive a funding commitment.	All libraries must file the Form 486 to release funding for invoicing; FCDL = Funding Commitment Decision Letter	Both Category One and Two services may be recurring (ex: monthly internet)	May request one 120-day extension by the deadline	Non-recurring = one-time purchases such as network equipment	May request one 120-day extension by the deadline

**The Federal Communications Commission has not yet released an order to clarify how Category Two funding will be handled in Funding Year 2020 and beyond.

TIMELINE FOR FY 2020

- **Competitive Bidding for FY 2020 services**
  - Opened July 1, 2019 (Form 470 released)
  - Last date to open competitive bidding: February 20, 2020 *(projected – date not finalized)*
- **When Services Will Happen for FY 2020**
  - Recurring Services: July 1, 2020 to June 30, 2021
    - Includes: Category One monthly internet access or transport services; Category Two basic maintenance of eligible equipment)
  - Non-recurring Services: April 1, 2020 to September 30, 2021
    - One-time Category Two purchase/installation

TIME TO UPDATE PROFILES

The 'administrative window' to update entity profiles will remain open until the Form 471 filing window begins.

- **Has a branch's address, phone #, or square footage changed?**
  - Update information in the E-rate Productivity Center
  - If the square footage will change before September 30, 2021 due to construction, make sure you have documentation to verify the new square footage before the Form 471 for Category Two is filed.
- **Are you opening or closing branches during FY 2020?**
  - Obtain entity numbers for new branches
  - Consider permanently canceling entity numbers for closed branches once all E-rate invoicing for that branch has been completed.

E-RATE ELIGIBLE SERVICES LIST

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THE ELIGIBLE SERVICES LIST

- The full E-rate Eligible Services List can be downloaded from the USAC website: http://www.usac.org/sl/applicants/beforeyoubegin/eligible-services-list.aspx
- Eligible services are separated into two broad categories:
  - Category One: Connectivity to the Building
  - Category Two: Connectivity to the Device

Draft Funding Year 2020 Eligible Services List released August 2, 2019: https://ecfsapi.fcc.gov/file/0802706006732/DA-19-738A1.pdf

CATEGORY ONE

- **Data Transmission Services & Internet Access**
  - **Monthly Internet service for branch buildings, including installation** – lines/circuits can be fiber or non-fiber (coax cable, DSL, etc.)
    - Fees for static IP addresses are eligible as part of your library's internet access
    - Fees for "basic termination equipment, such as a cable modem, CSU/DSU, network interface device, or copper-to-fiber converter" may be eligible as part of your library's internet access. See USAC's On-Premise Category One Equipment page.
    - Fees for router from the internet service provider may be eligible under Category One in limited circumstances. See USAC's On-Premise Category One Equipment page & Q9 of FAQs: Eligible Fiber Services
  - **Leased data lines (T1, lit fiber, dark fiber, etc.)**
  - **Cellular data (hotspot service) for bookmobile only**
  - **Self-provisioned broadband networks (owned/operated by applicant)**
  - **Network Equipment required to make data transmission and/or internet access functional (ex: modulating electronics)**

Recurring service dates for Funding Year 2020: July 1, 2020 to June 30, 2021

No budget limit on Category One requests

CATEGORY TWO- IC

Internal Connections

- Antenna, connectors, & related components
- Cabling
- Switches
- Routers
- Access points
- Wireless controller systems
- Firewalls**
- UPS (Uninterruptible Power Supply)**
- Racks**
- Caching services or equipment
- Software supporting components on the list used to distribute broadband through the library – ex: licenses for access points

**Some restrictions apply

If your library leases a router from your internet service provider, then bid for Category Two Internal Connections for Function: Router.

More flexibility – equipment can be installed as soon as April 1, 2020 or as late as September 30, 2021.

These eligible functions can be virtualized in the cloud or combined in equipment (like routing and switching).

CATEGORY TWO – BMIC & MIBS

Basic Maintenance of Internal Connections

- Repair and upkeep of eligible hardware (even if not purchased through E-rate)
- Wire and cable maintenance
- Configuration changes
- Basic technical support including online and telephone based technical support
- Software upgrades and patches including bug fixes and security patches

Managed Internal Broadband Services (MIBS)

- 3rd party operation, management, and monitoring of eligible broadband internal connections (ex: managed Wi-Fi)

Funds for Learning has a good explanation of Basic Maintenance of Internal Connections (BMIC).

MISCELLANEOUS

May fall under Category One or Two:

- Some taxes, surcharges, and other similar, reasonable charges
  - Federal Access Recovery Charge on internet invoices – permissible charge for use of a local carriers network; not all ISPs charge this
  - USF fees on internet invoices - "customer charges for universal service fees, but do not include additional charges for universal service administration"
- Rental or lease fees for eligible components
- Shipping
- Training – only for new equipment purchased with Cat2 funds
- Installation and configuration
  - May be performed by a 3rd party rather than the vendor who sold the equipment

DUPLICATIVE SERVICES

Caution – E-rate does **not** provide discounts for services that are considered duplicative. Example: internet access that is used as backup, redundancy, failover, etc.

If the connections serve different populations (internet for public, internet for staff), they may be considered E-rate eligible.

§22 of the Second Report and Order and Further Notice of Proposed Rulemaking for the E-rate program addresses duplicative services:

"*Funding of Duplicative Services* In the *Universal Service Order*, the Commission indicated that an applicant's request for discounts should be based on the reasonable needs and resources of the applicant, and bids for services should be evaluated based on cost-effectiveness. Pursuant to this requirement, the Administrator has denied discounts for duplicative services. *Duplicative services are services that deliver the same functionality to the same population in the same location during the same period of time.* We emphasize that *requests for discounts for duplicative services will be rejected* on the basis that such applications cannot demonstrate, as required by our rules, that that they are reasonable or cost effective." *[emphasis mine]*

CIPA COMPLIANCE

Children's Internet Protection Act (CIPA) compliance:

- Necessary if requesting E-rate discounts for Internet Access or any Category Two products & services
  - Exception: CIPA compliance not required when requesting Telecommunications services only (ex: transport only for WAN circuit between library branches)
- 3 elements of compliance:
  - Technology Protection Measure (filter)
  - Internet Safety Policy
  - Public Meeting prior to adopting Internet Safety Policy
- View archived training from KDLA – check E-rate section: https://kdla.ky.gov/librarians/staffdevelopment/kdlaarchivedwebinars/Pages/default.aspx

SPECIAL NOTES ON VOICE SERVICE

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VOICE SERVICES – NO LONGER E-RATE ELIGIBLE

- E-rate discounts for voice service were eliminated for Funding Year 2019 and forward due to the FCC's E-rate Modernization Order *(see note on 'Phasing Down and Ending Support for Legacy Services')*.
- The voice service phasedown also eliminated discounts for data circuits that support only voice or for dedicated voice service channels on an Integrated Services Digital Network (ISDN) circuit.

BIDDING FOR VOICE AS NON-ELIGIBLE SERVICE?

- E-rate applicants can consider **E-rate *ineligible* services** as a lower-weighted factor in their bid evaluations so long as **E-rate *eligible* services** are the most-heavily weighted factor.
- Phone service may still need to factor into your bid evaluations for internet access because it may not be cost effective to switch to a new internet provider if that would also require changing to a more expensive phone service.

Vendor	Telecom A	Telecom B
E-rate eligible cost (internet access) – 50 pts	$500/month + $0 installation – 50 pts	$550/month + $0 installation – 45.5 pts
E-rate ineligible cost (phone service) – 20 pts	$185/month – 13 pts	$120/month – 20 pts
Total – 70 pts	63 pts	65.5 points

KEEP UP WITH VOICE SERVICE CONTRACTS!

- If your library doesn't include ineligible phone service with competitive bidding: Ask your current vendor to review all the phone numbers and call features your library pays for; several libraries have discovered charges for phone lines that aren't in use!
  - Don't be complacent – it's to the vendor's advantage when you don't question charges on invoices – be a good steward of public funds and fight for the best deal and accurate invoicing.
- Consider whether your library can save money over a 3-5 year period by switching to VOIP.
- Libraries are eligible to purchase phone service off the KIH3 state master contract (current expiration 2/20/2022); AT&T OneNet Long Distance is $0.0211 per minute (plus federal charges). Most libraries sign individual business local calling contracts for desired call features.

COMPETITIVE BIDDING OVERVIEW

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COMPETITIVE BIDDING

On the Form 470, applicants describe the E-rate eligible services they need. Potential service providers have at least 28 calendar days to respond with bids.

- No decision about which service provider to use can be made before 28 calendar days have elapsed.
- You can wait longer if you want; you must wait longer if you release an RFP document with a later due date.

Filing a Form 470 does not obligate an applicant to sign contracts or accept E-rate funding.

OPEN & FAIR PROCESS

- Open and fair competitive bidding is a core principle of the E-rate program
- From the USAC website:
  - "Open" means there are no secrets in the process – such as information shared with one bidder but not with others – and that all bidders know what is required of them. "Fair" means that all bidders are treated the same and that no bidder has advance knowledge of the project information.
  - **Never** share pricing information or tell vendors who else is bidding.

PRI¢E I$ PARAMOUNT

E-rate applicants are required to select the most cost-effective solution for the services they request E-rate discounts on.

- **E-rate eligible cost must be assigned the highest point value in the bid evaluation.**
  - **E-rate ineligible costs can be considered in the bid evaluation, but at a lower point value than eligible costs.**
- The least-expensive solution doesn't always win the bid evaluation; it may not score well on factors other than cost.

FROM SERVICE REQUESTS TO FUNDING REQUESTS

- Having both the correct service requests and narrative language will be important during application review. Libraries should review the revised examples KDLA will post on the Form 470 Competitive Bidding examples page, as well as the USAC Form 470 Category One Drop-Down reference table.
- The Form 470 service requests must encompass the details of the services your library will list on the Form 471 application. For example, your library can't request discounts on a bandwidth that is higher than the maximum bandwidth capacity on the Form 470 or for a type of circuit that wasn't listed on the Form 470.
  - See next slide for examples

COVERING YOUR REAR FOR THE FORM 471

***Funding* Requests on the Form 471** application for discounts

- If my library will make *funding* requests for discounts on:
  - Fiber internet access or fiber transport circuits
  - Cable or DSL internet access
  - Bookmobile hotspot service
- If a library branch or the bookmobile will be a recipient of service on the application

***Service* Requests on the Form 470** for competitive bidding

- Then the Form 470 must include *service* requests for:
  - Leased Lit Fiber (With or Without Internet Access)
  - Internet Access and Transport Bundled (Non-Fiber)
  - Cellular Data Plan/Air Card Service
- Then the branch and address must be included in the competitive bidding information

BUSINESS-CLASS INTERNET BIDDING EXEMPTION

A Form 470 for internet access is not necessary if ALL these conditions are met:

- Bandwidth is at least 100 Mbps downstream and 10 Mbps upstream
- Provides basic conduit access to the Internet at those required minimum speeds.
- Pre-discount cost is less than $3600 annually ($300/month) for each eligible entity, including any installation or other eligible fees
- Service and price are commercially available to non-residential customers

CONTRACTS

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CONTRACT EXPIRING?

Are any of your contracts for E-rate eligible recurring services such as internet or cellular data for the bookmobile **set to expire before June 30, 2021?**

- **If Yes**, you must bid again for these services on a Funding Year 2020 Form 470
- Recurring services purchased month-to-month or by tariff agreements must be bid every year.
- You should also bid again if your library is still under contract but needs to sign new paperwork to make upgrades with your provider.
- WHEN IN DOUBT, BID AGAIN.

YOUR LIBRARY'S PROCUREMENT PROCEDURE

Does your library board need to review contracts before they are signed?

- If so, keep in mind the board meeting dates in late 2019 and early 2020.
- Once the Form 471 filing deadline is set…
  - Look up the date for the last board meeting that will occur before the projected Form 471 deadline (March 20, 2020)
    - Plan to file all Forms 470 for competitive bidding at least 5 weeks prior to this board meeting. (Sooner is better!)

ALREADY UNDER CONTRACT?

Q: My library wants E-rate support for Funding Year 2020, but we have an ongoing contract that wasn't approved for E-rate discounts in a previous funding year. Is it possible to get E-rate for that service?

A: Yes, but there are some provisos:

- The existing contract must honestly win the bid evaluation.
- You must memorialize the contract with a new E-rate "Contract Award Date"—you'll sign and date the contract again to show that it won the bid evaluation at some date after the 28 calendar day competitive bidding period.
- THIS IS NOT THE IDEAL WAY TO DO E-RATE – The best practice is to file a Form 470, wait at least 28 calendar days, evaluate bids, and then sign a new contract. Any deviation from this best practice complicates how you enter data on forms.

MODEL PROCUREMENT

- Most Kentucky libraries follow the Kentucky Model Procurement Code
  - The library board must adopt the MPC as its official way to purchase, and this step was likely taken many years ago (the MPC is 40+ years old).
  - Spelled out in Kentucky Revised Statutes 45A.345–.460
  - Must receive competitive sealed bids for contracts and purchases over $30,000. A notice must be given in a newspaper *or* through an internet post at least 7 days before the date set for the opening of bids. The bids must be opened publicly in an announced location and the contract awarded to either the lowest bidder or the bidder submitting the lowest evaluated bid price. (See KRS 45A.365)

KRS 424.260(1)

- If your library doesn't follow the Model Procurement Code, then purchases over $30,000 must be bid per KRS 424.260(1)
  - Must also advertise the bid per KRS 424.130
  - You need only advertise once, but may advertise two or more times provided that at least one advertisement is carried between 7 and 21 days before the close of bidding. The advertisement must include a description of what is to be bid, the time and place for receipt of bids, and any special terms of the sale.

FORM 470 BOILERPLATE

- The Form 470 contains a field for state and local procurement information. Here's some boilerplate for you to use:
  - **For MPC libraries:** The Kentucky Model Procurement Code (Kentucky Revised Statutes 45A.345-.460) requires bids for contracts and purchases over $30,000. See https://legislature.ky.gov/Law/Statutes/Pages/default.aspx
  - **For non-MPC libraries:** Kentucky Revised Statute 424.260(1) requires bids for contracts and purchases over $30,000. See https://legislature.ky.gov/Law/Statutes/Pages/default.aspx

E-RATE PRODUCTIVITY CENTER: UPDATING LIBRARY PROFILES

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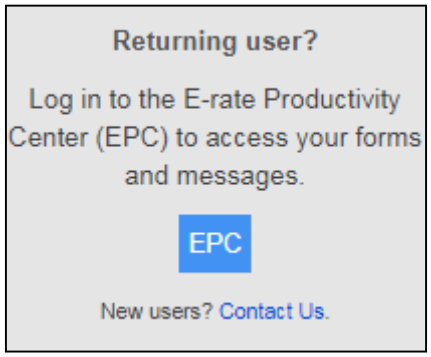
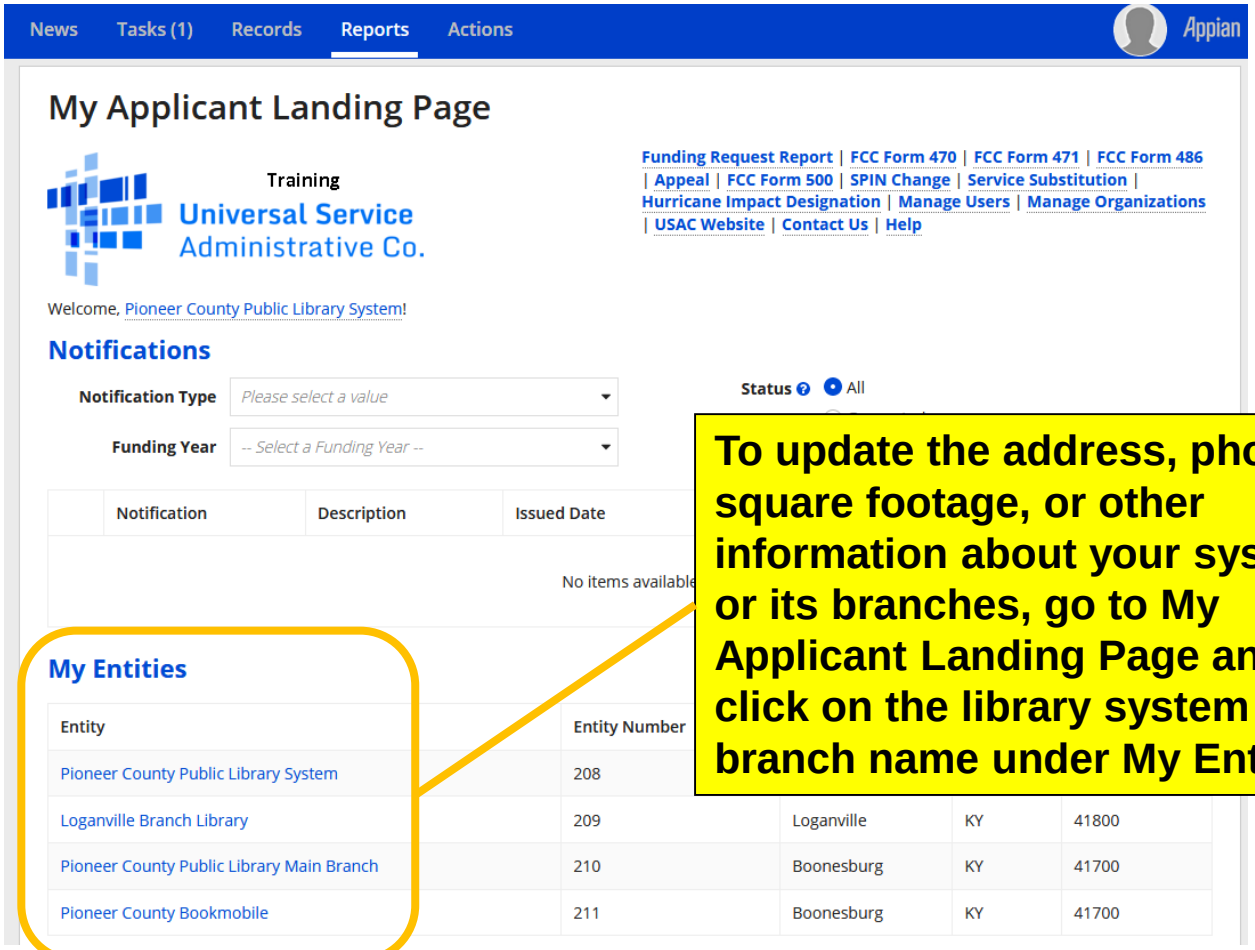
E-RATE PRODUCTIVITY CENTER

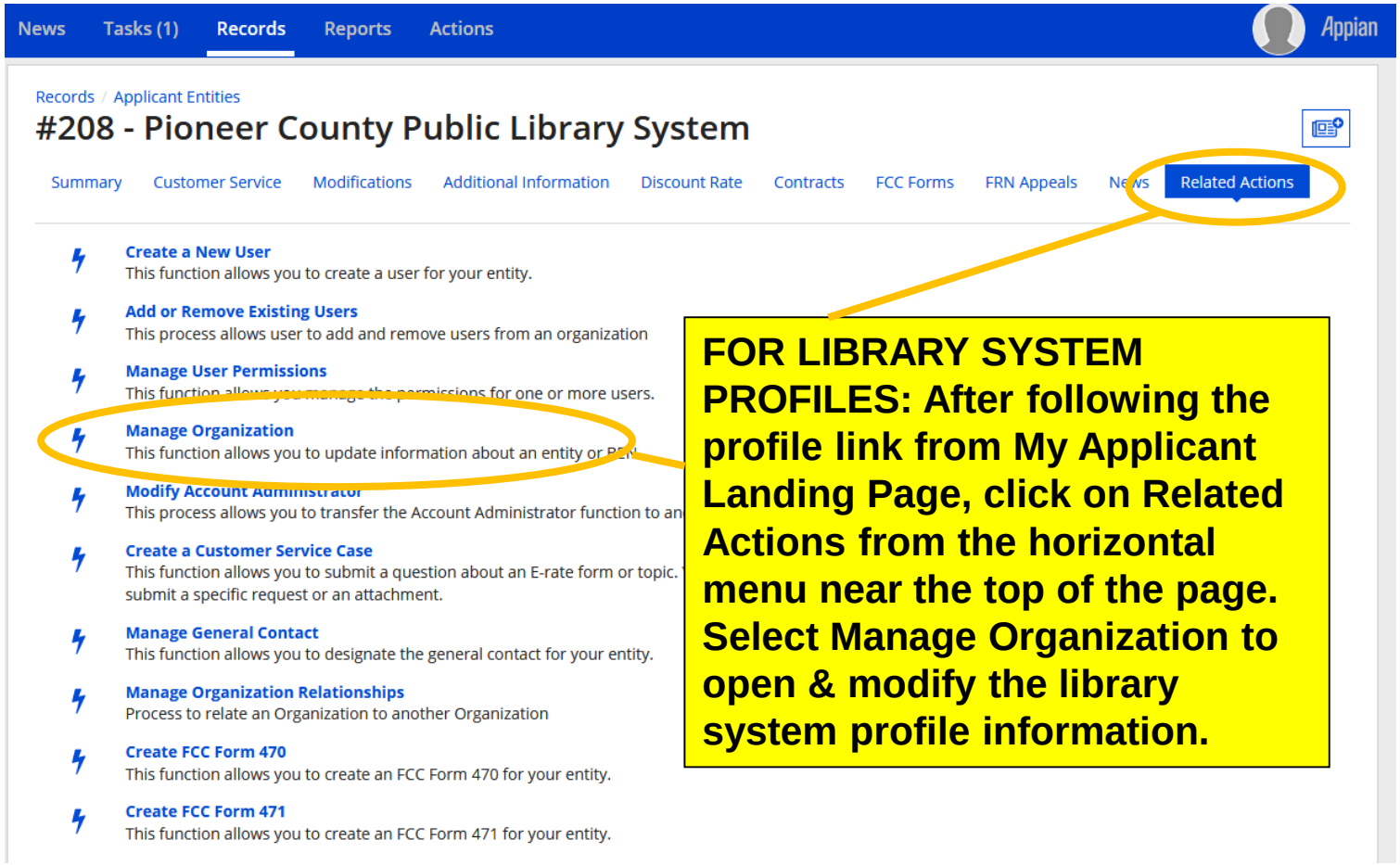
- To set up account or if you have login issues: call the USAC Client Service Bureau at 1-888-203-8100
  - Must select a staff member to act as account administrator. Once the administrator is set up in EPC, they can add more users for your library.
- Two ways to get to EPC portal:
  - Go to portal.usac.org
  - Go to main USAC website for Schools and Libraries (www.usac.org/sl) and select 'E-rate Productivity Center' under Resources & Tools on the left. Then look for EPC Log In button (picture on right).



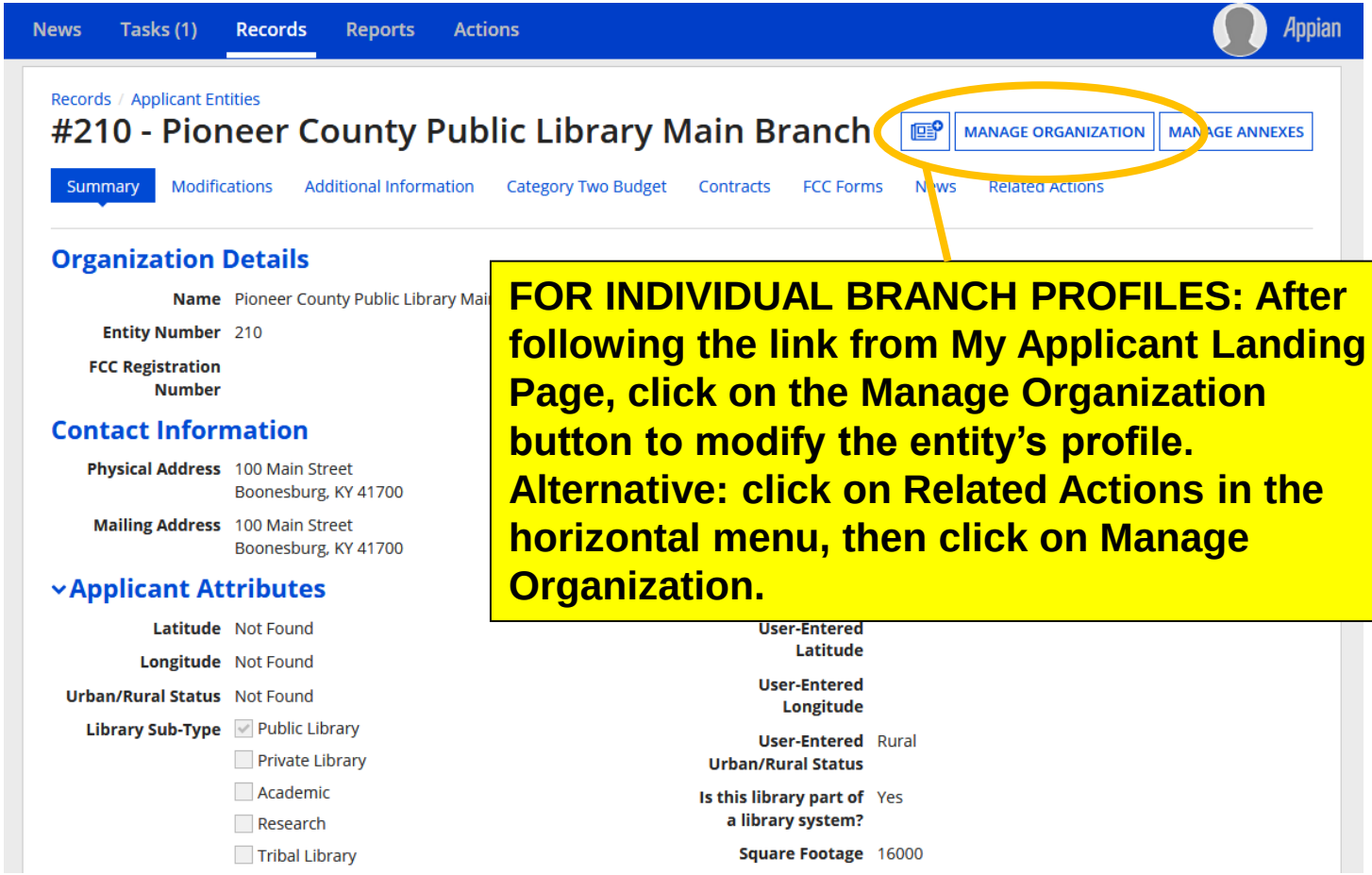
UPDATING PROFILES



UPDATING LIBRARY SYSTEM PROFILE



UPDATING BRANCH PROFILES



FOR INDIVIDUAL BRANCH PROFILES: After following the link from My Applicant Landing Page, click on the Manage Organization button to modify the entity's profile. Alternative: click on Related Actions in the horizontal menu, then click on Manage Organization.

FORM 470 – BASIC INFORMATION

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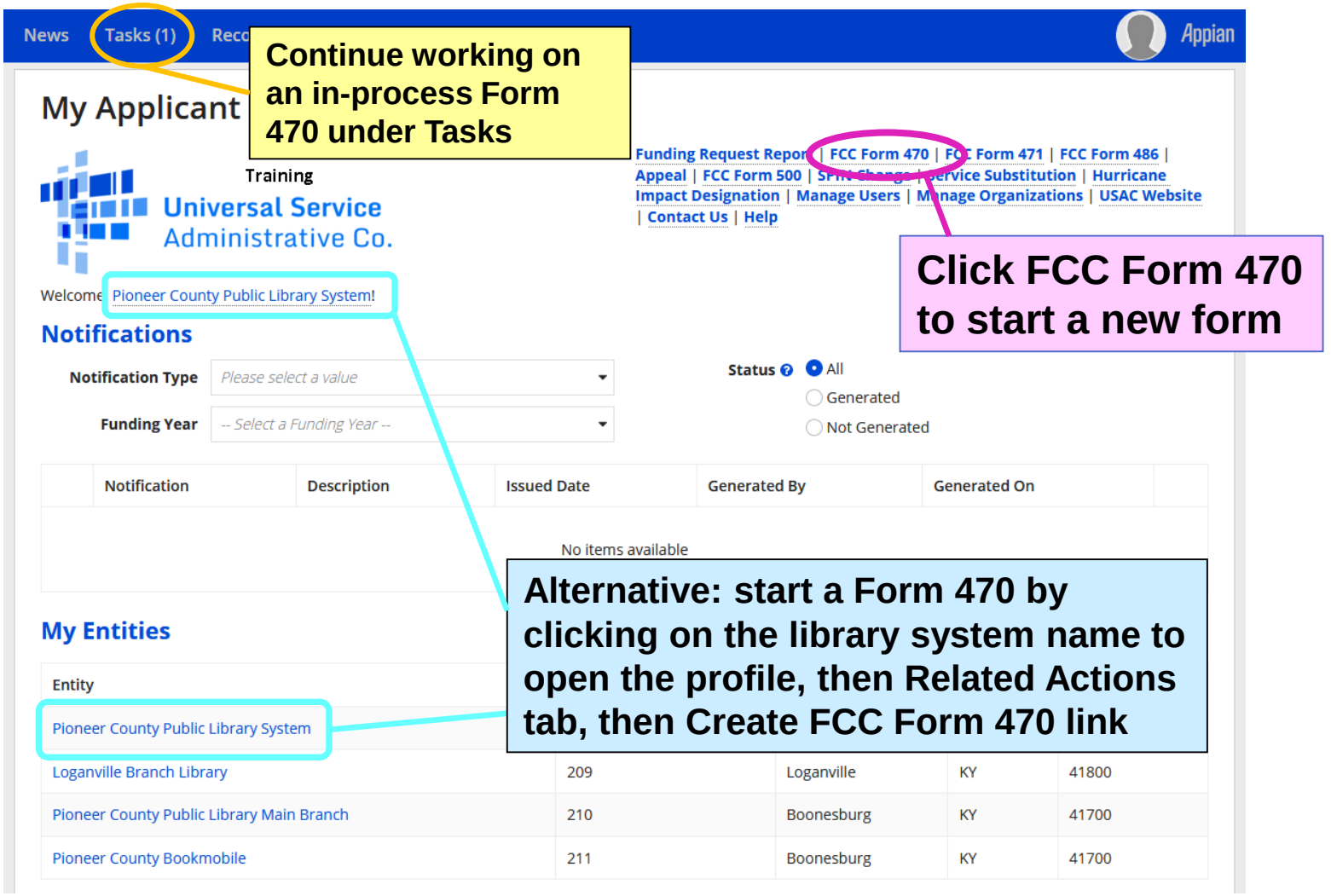
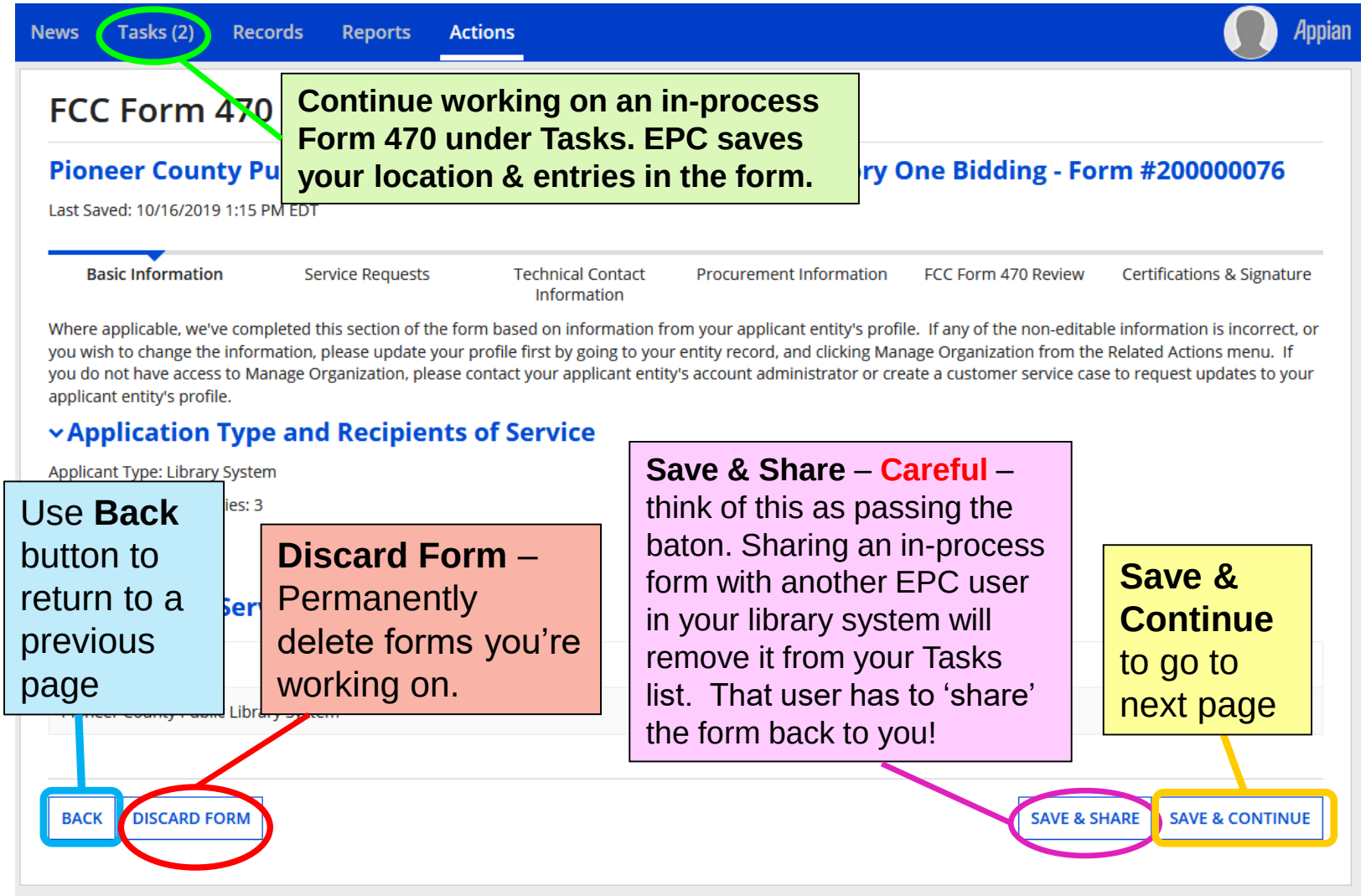
START OR CONTINUE A FORM 470



FORM 470 – NAVIGATION



Continue working on an in-process Form 470 under Tasks. EPC saves your location & entries in the form.

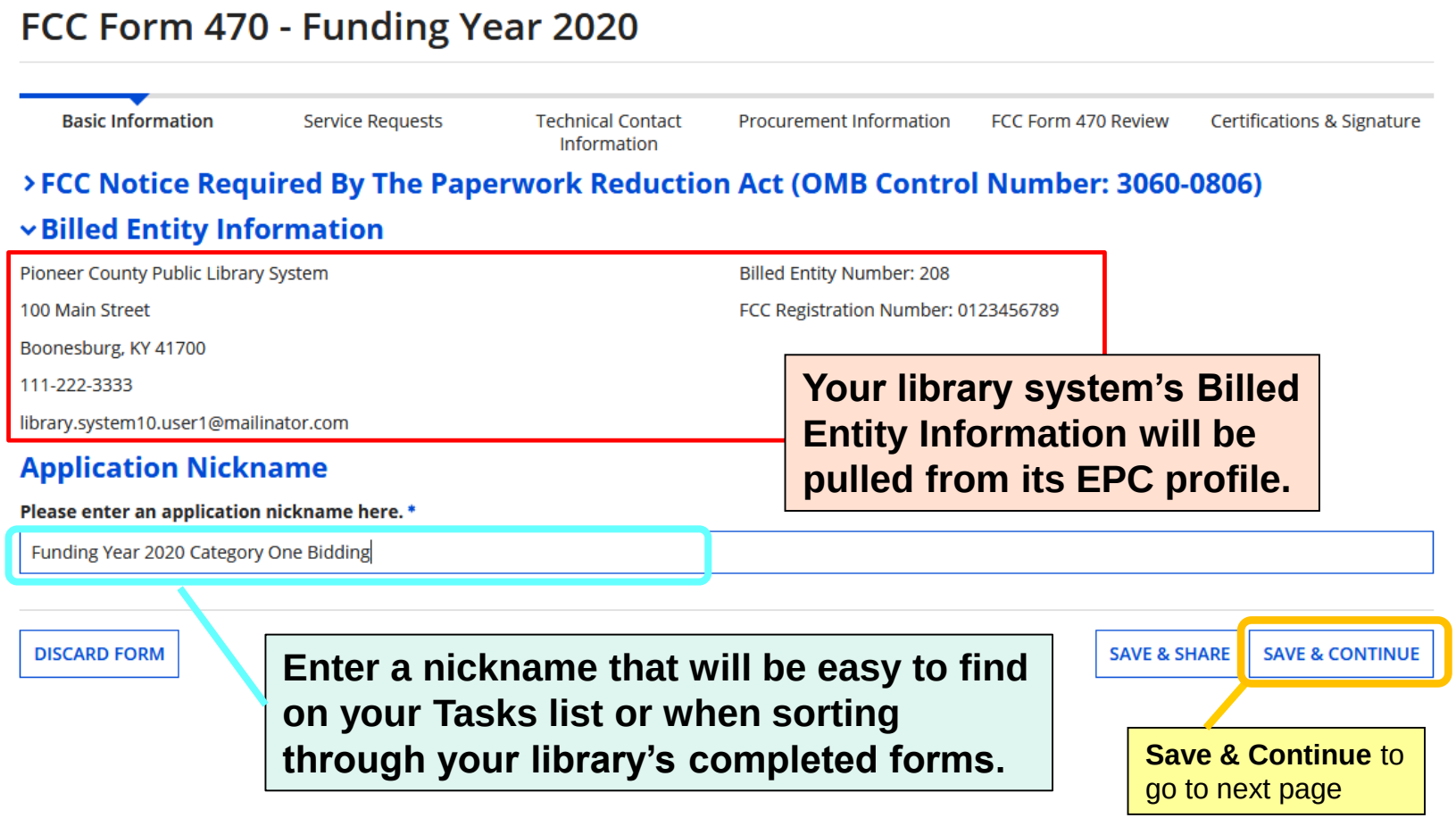
Use **Back** button to return to a previous page

Discard Form – Permanently delete forms you're working on.

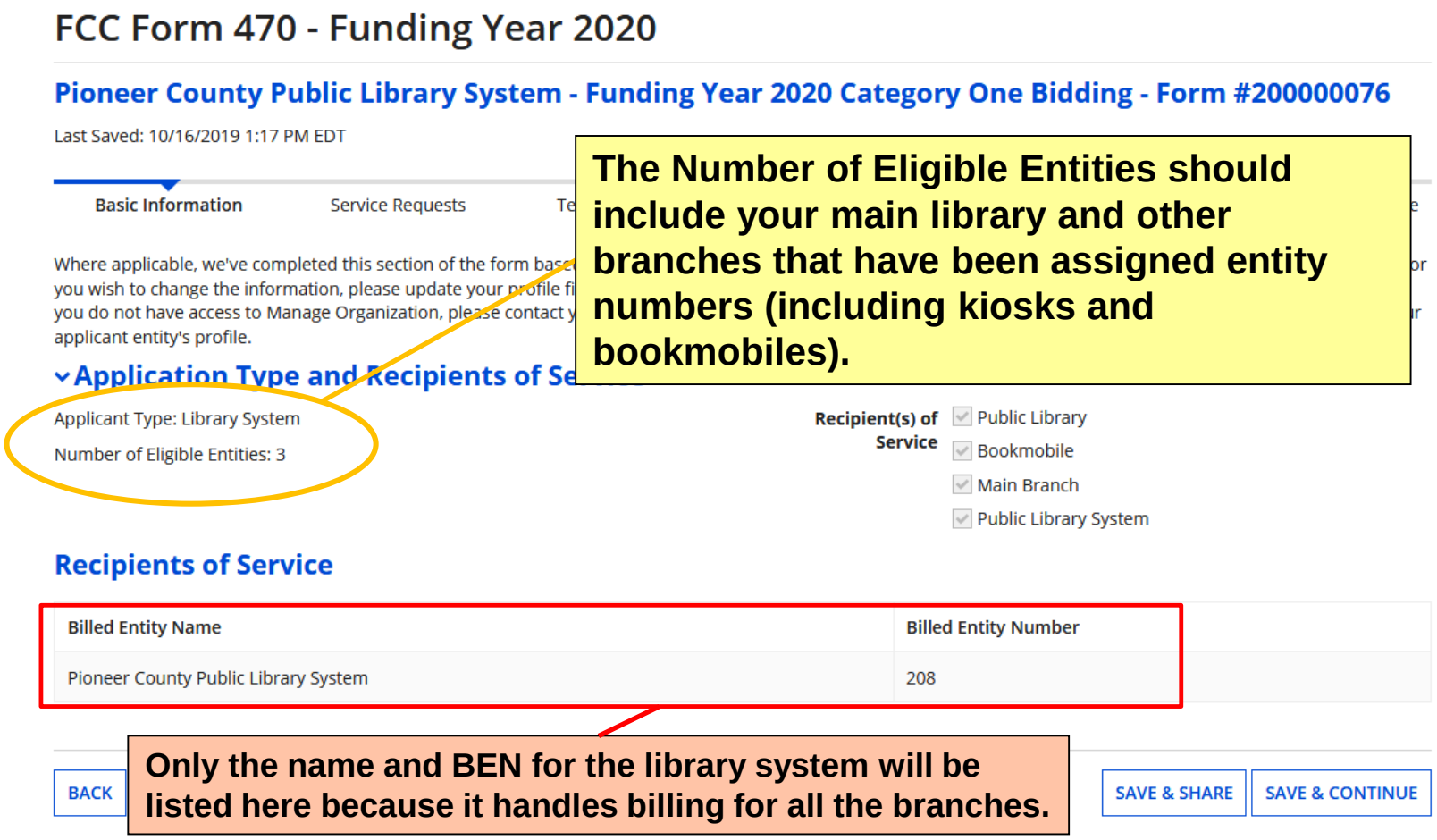
Save & Share – **Careful** – think of this as passing the baton. Sharing an in-process form with another EPC user in your library system will remove it from your Tasks list. That user has to 'share' the form back to you!

Save & Continue to go to next page

FORM 470 – BASIC INFORMATION (1/3)



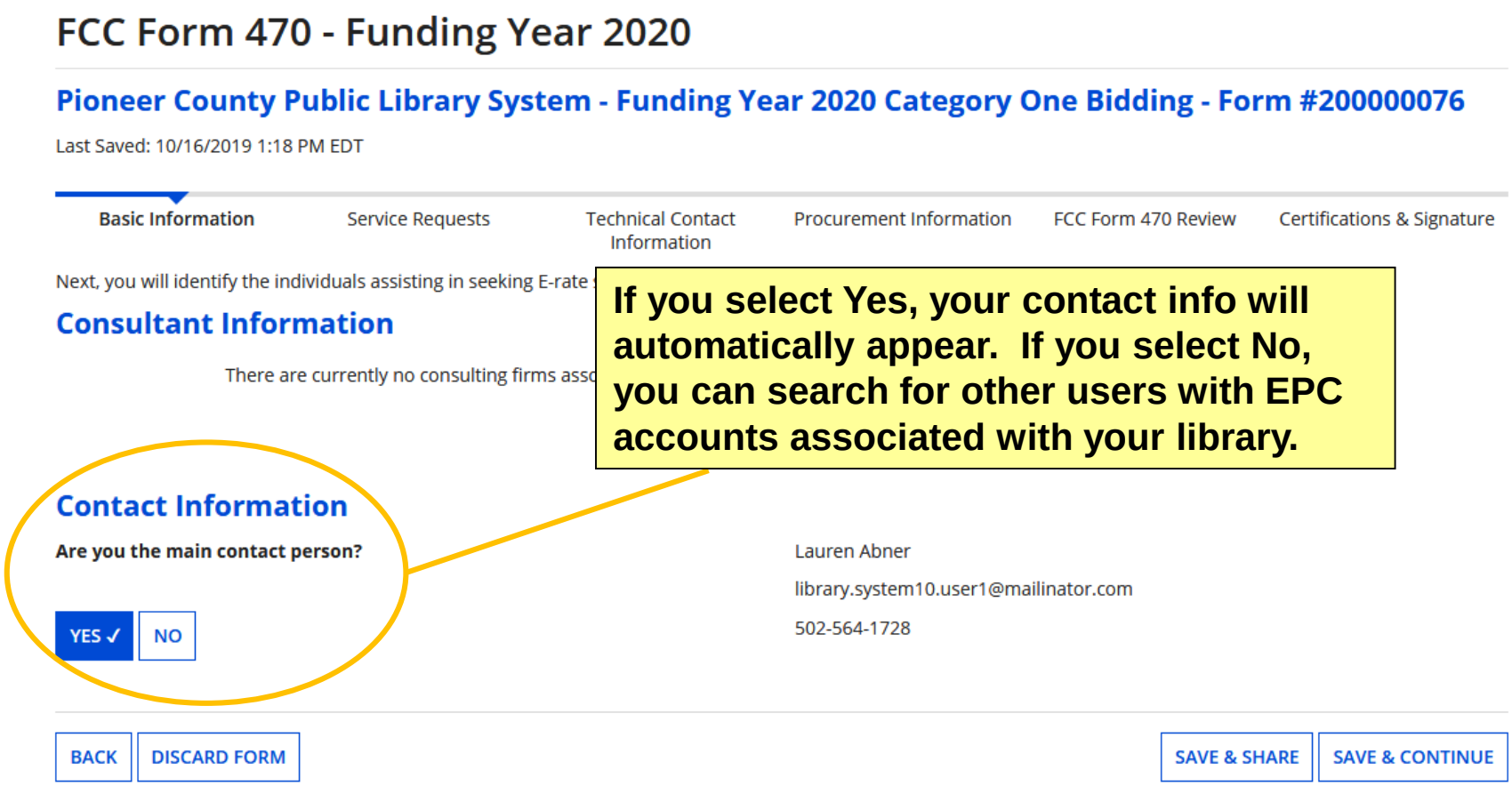
FORM 470 – BASIC INFORMATION (2/3)



The Number of Eligible Entities should include your main library and other branches that have been assigned entity numbers (including kiosks and bookmobiles).

Only the name and BEN for the library system will be listed here because it handles billing for all the branches.

FORM 470 – BASIC INFORMATION (3/3)



FORM 470 – CATEGORY OF SERVICE + RFP DOCUMENTS

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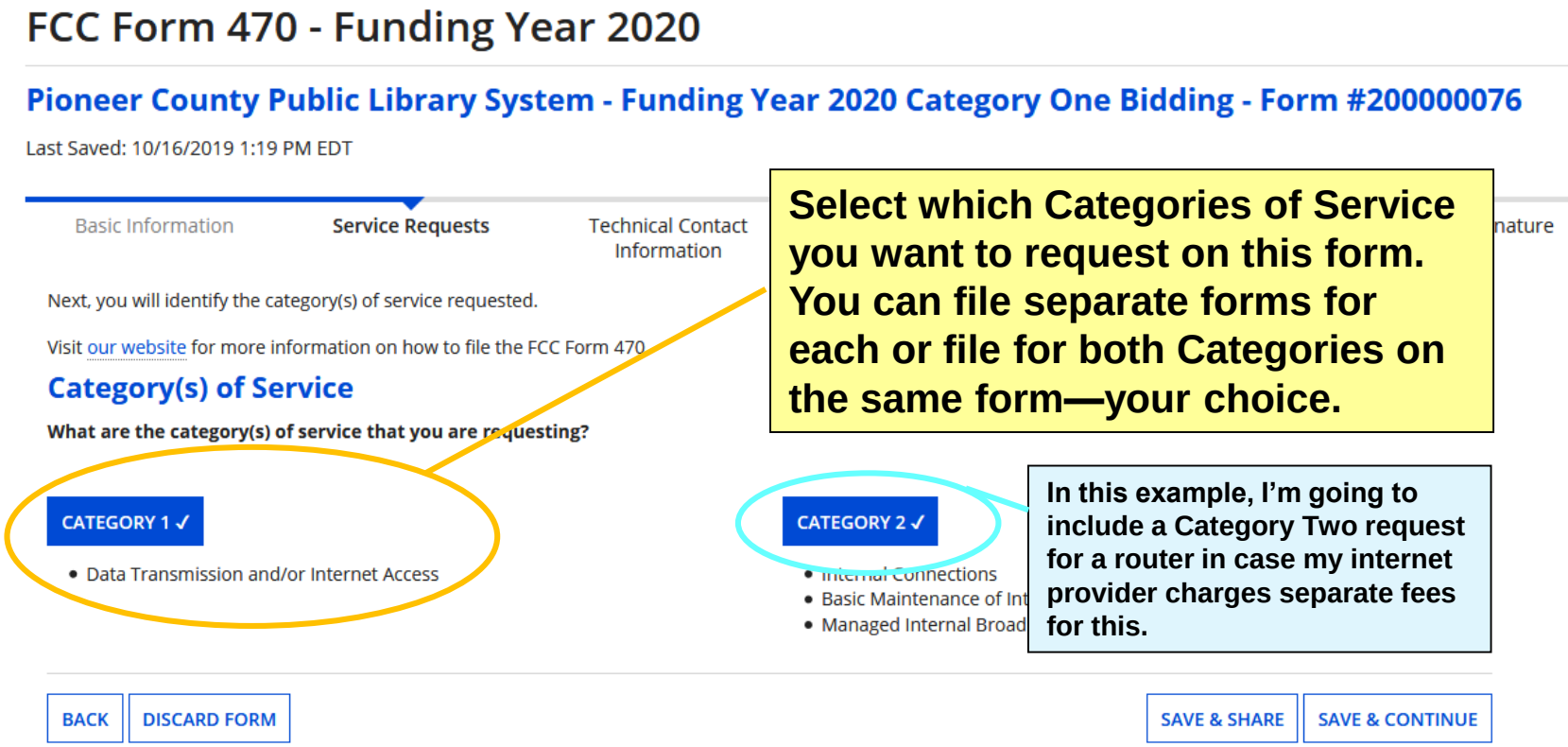
CATEGORY(S) OF SERVICE



Select which Categories of Service you want to request on this form. You can file separate forms for each or file for both Categories on the same form—your choice.

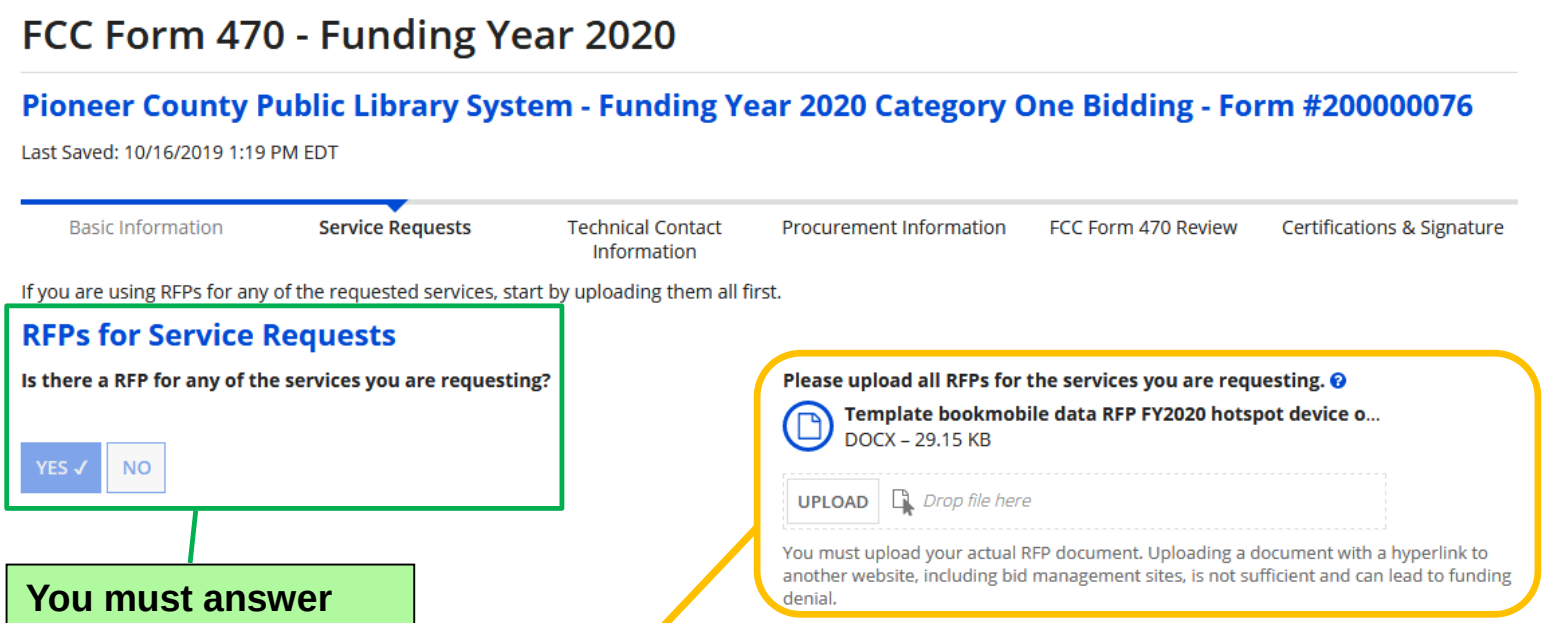
In this example, I'm going to include a Category Two request for a router in case my internet provider charges separate fees for this.

NOTE ON RFP DOCS

USAC uses the terms 'RFP' or 'request for proposal' for any documents that further describe an applicant's needs. RFPs can be useful when making extensive requests and are required by E-rate program rules for certain requests.

- **Applicants must upload RFP documents:**
  - **If such documents have been issued as part of the procurement**— you have to upload all RFP documents in EPC, not merely provide a link to where they are posted elsewhere.
  - ****To request cellular data for the bookmobile**: USAC requires RFPs for cellular data that include a description of the service requested ('placeholder' RFPs aren't allowed). Templates for bookmobile data RFPs can be downloaded from the KDLA Form 470 Competitive Bidding Examples page.
  - **To make Category One service requests for other Functions** including "Leased Dark Fiber and Leased Lit Fiber"; "Self-Provisioned Network (Applicant Owned and Operated Network) and Services Provided Over Third-Party Networks"; "Maintenance & Operations"; and 'Other'.

UPLOADING RFPs (1/2)



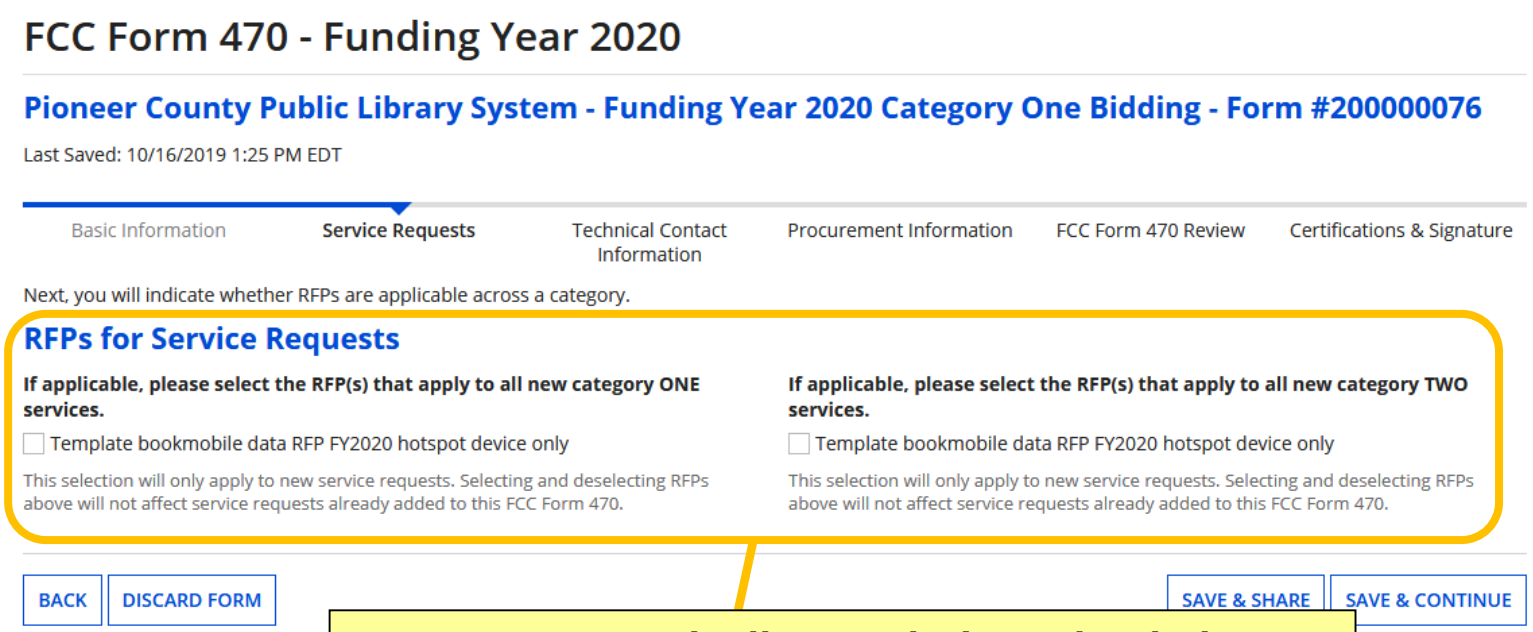
You must answer the RFP question to move forward; if you indicate Yes, options for uploading files will appear.

Upload button allows you to select documents from your computer. Most file formats, including zip files, are accepted. Note: EPC doesn't allow certain special characters such as hyphens in the file name.

To remove an RFP document, hover over the document icon

and click when it turns into an X

UPLOADING RFPs (2/2)



You can automatically attach the uploaded RFP to ALL service requests in the selected Category of Service. Most libraries won't do this for Category One requests, but it's common for extensive Category Two equipment upgrades.

FORM 470: EXAMPLE SERVICE REQUESTS

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EXAMPLES – COLOR CODING

- General Notes (adding service requests, closing explanatory text, editing/removing service requests, narrative & installment plan) – slides 52-55
- For a building with monthly fiber internet service:
  - Category One Function: Leased Lit Fiber (with or without Internet Access) – slides 56-59
- For a building with non-fiber service that could upgrade to fiber:
  - Category One Function #1: Leased Lit Fiber (with or without Internet Access) – slides 60-63
  - Category One Function #2: Internet Access & Transport Bundled (Non-Fiber) – slides 64-68
- For bookmobile hotspot service:
  - Category One Function: Cellular Data Plan/Air Card Service – slides 69-74
- For router lease from internet service provider
  - Category Two Service Type: Internal Connections, Function: Router – slides 75-78

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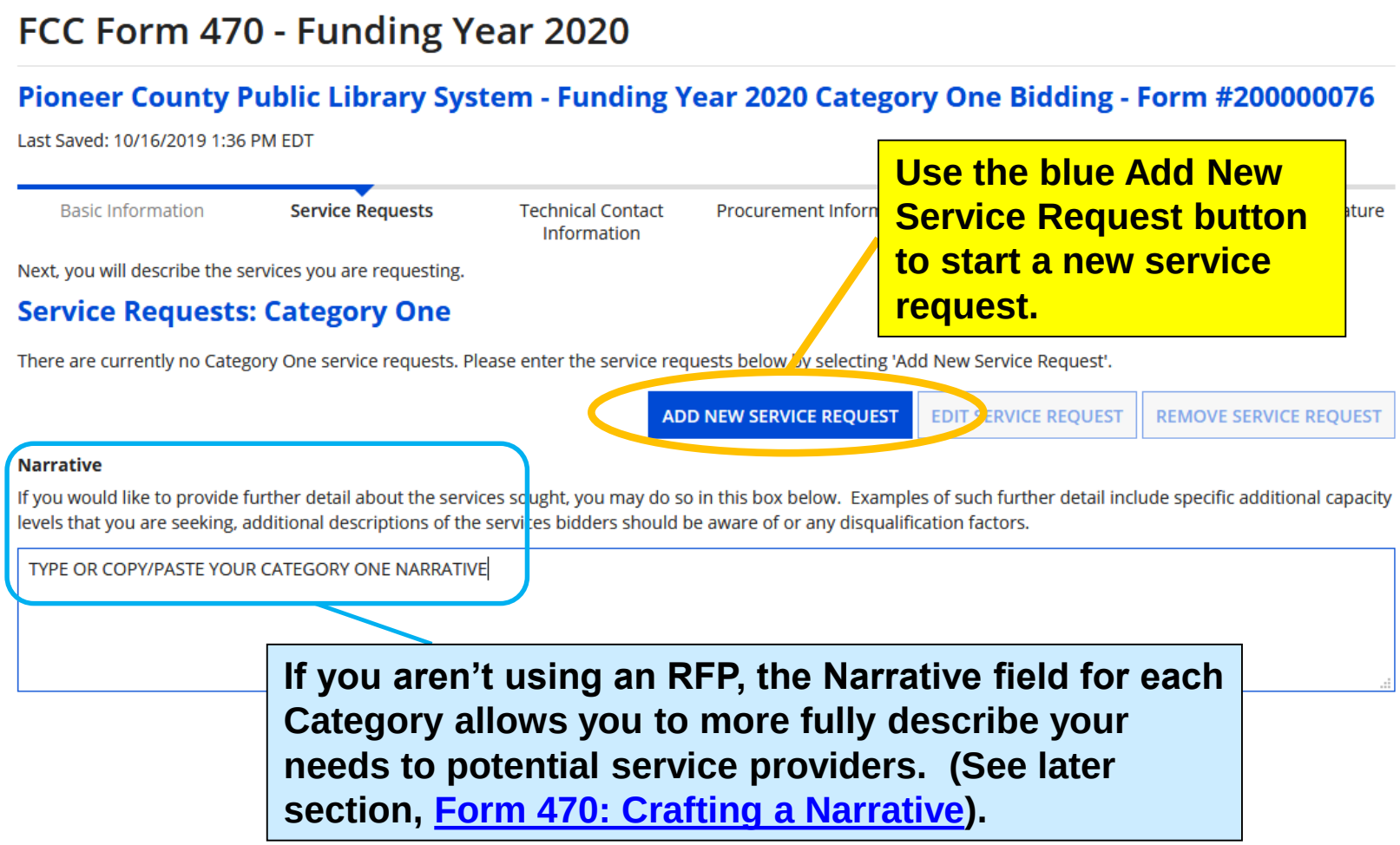
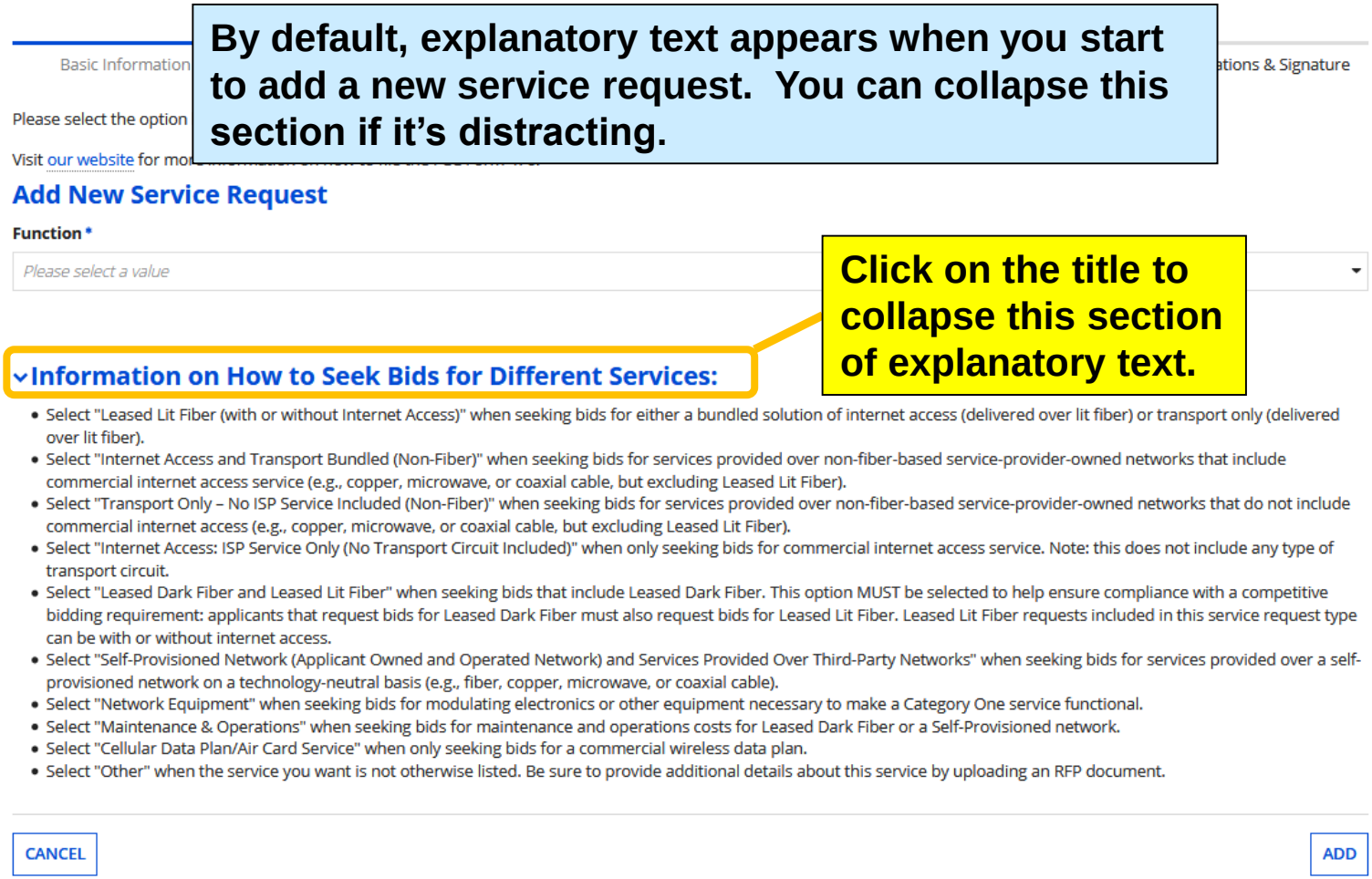
ADDING SERVICE REQUESTS



Return to Examples – Color Coding

CLOSE EXPLANATORY TEXT



Return to Examples – Color Coding

EDIT OR REMOVE SERVICE REQUESTS

Service Requests: Category One

Please enter the service requests below by selecting 'Add New Service Request'.

	Service Type	Function	Function Other Description	Minimum Capacity	Maximum Capacity	Entities	Quantity	Unit	Installation and Initial Configuration?	Associated RFPs
☐	Data Transmission and/or Internet Access	Leased Lit Fiber (with or without Internet Access)		100 M						
☐	Data Transmission and/or Internet Access	Leased Lit Fiber (with or without Internet Access)		25 Mb						
☑	Data Transmission and/or Internet Access	Internet Access and Transport Bundled (Non-Fiber)		25 Mbps	100 Mbps	1	1	Circuits	Yes	
☐	Data Transmission and/or Internet Access	Cellular Data Plan/Air Card Service		5 Mbps	25 Mbps	1	1	Lines	Yes	Template bookmobile data RFP FY2019

To edit or remove a service request, check the box in the far left column. You can edit/remove only 1 service request at a time.

ADD NEW SERVICE REQUEST | EDIT SERVICE REQUEST | REMOVE SERVICE REQUEST

Select 'Edit Service Request' to re-open and make changes to a service request. Select 'Remove Service Request' to delete a service request entirely.

Return to Examples – Color Coding

NARRATIVE & INSTALLMENT PLAN

Narrative

If you would like to provide further detail about the services sought, you may do so in this box below. Examples o
levels that you are seeking, additional descriptions of the services bidders should be aware of or any disqualificat

For all service requests, the vendor must have a Service Provider Identification Number (SPIN/Form 498 ID) or th
access (leased lit fiber or non-fiber) that do not include the service delivery address will be considered non-respo
SERVICE DELIVERY ADDRESSES
Pioneer County Public Library has 3 eligible entities for Category One: The Main Library located at 100 Main Stre
located at 300 Tulip Poplar Lane, Loganville, KY 41800; and the library bookmobile which operates from the main
QTY 1 CIRCUIT FOR MAIN LIBRARY, LEASED LIT FIBER BUNDLED WITH INTERNET ACCESS. The main library curren
gigabit. Please quote all download speeds between 100 Mbps and 1 gigabit over a fiber circuit available for this l
taxes and other surcharges. Preferred service start date is July 1, 2020.
QTY 1 CIRCUIT FOR LOGANVILLE BRANCH LIBRARY, EITHER LEASED LIT FIBER BUNDLED WITH INTERNET ACCESS
(NON-FIBER). The Loganville branch currently has 25xc Mbps cable internet; desired speed is 200 Mbps fiber int
Mbps and 200 Mbps with circuit (fiber or non-fiber) available for this location, fees for 5 static IP addresses, and estimated taxes and other surcharges. Preferred service start date is July 1, 2020.
QTY 1 HOTSPOT FOR BOOKMOBILE, CELLULAR DATA PLAN/AIR CARD SERVICE. Please see RFP document for details of this request. Preferred service start date is July 1, 2020.
PHONE SERVICE FOR MAIN BRANCH AND LOGANVILLE BRANCH (NOT ELIGIBLE FOR E-RATE DISCOUNTS). The library system currently has 14 analog phone lines for local/long distance; 10 lines at the main library and 4 at the Loganville Branch. Please

Make sure the narrative and/or RFP documents cover all Category One service requests. More tips on the narrative appear in the next section, Form 470: Crafting a Narrative.

Installment Payment Plan

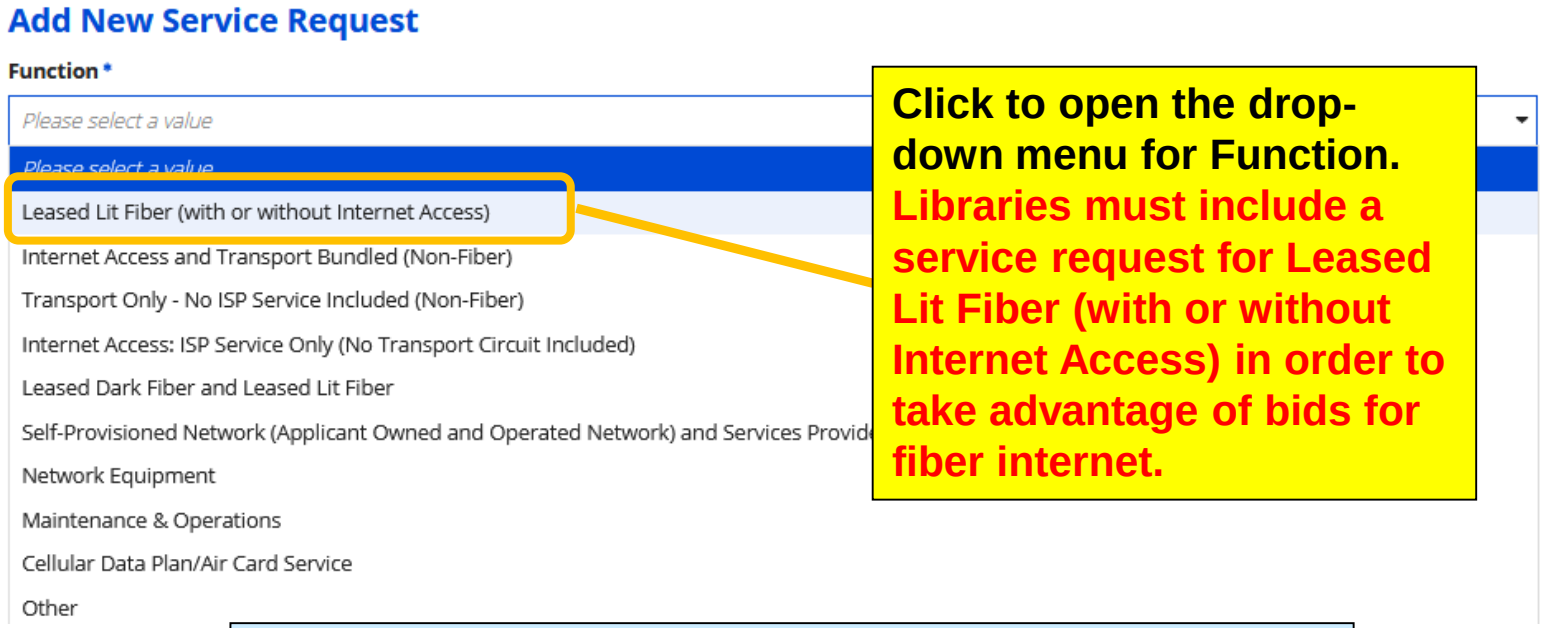
Are you seeking an installment payment plan for the non-discounted portion of any special construction charges associated with the request(s) listed above? *

- ○ Yes
- ◉ No

For Category One, you have to answer a question about installments for special construction charges. It's rare for Kentucky libraries to request special construction, so most likely the answer is 'No'. For more on special construction, see USAC's Fiber – Summary Overview page.

Return to Examples – Color Coding

FOR A BUILDING WITH FIBER SERVICE— FUNCTION: LEASED LIT FIBER (WITH OR WITHOUT INTERNET ACCESS)

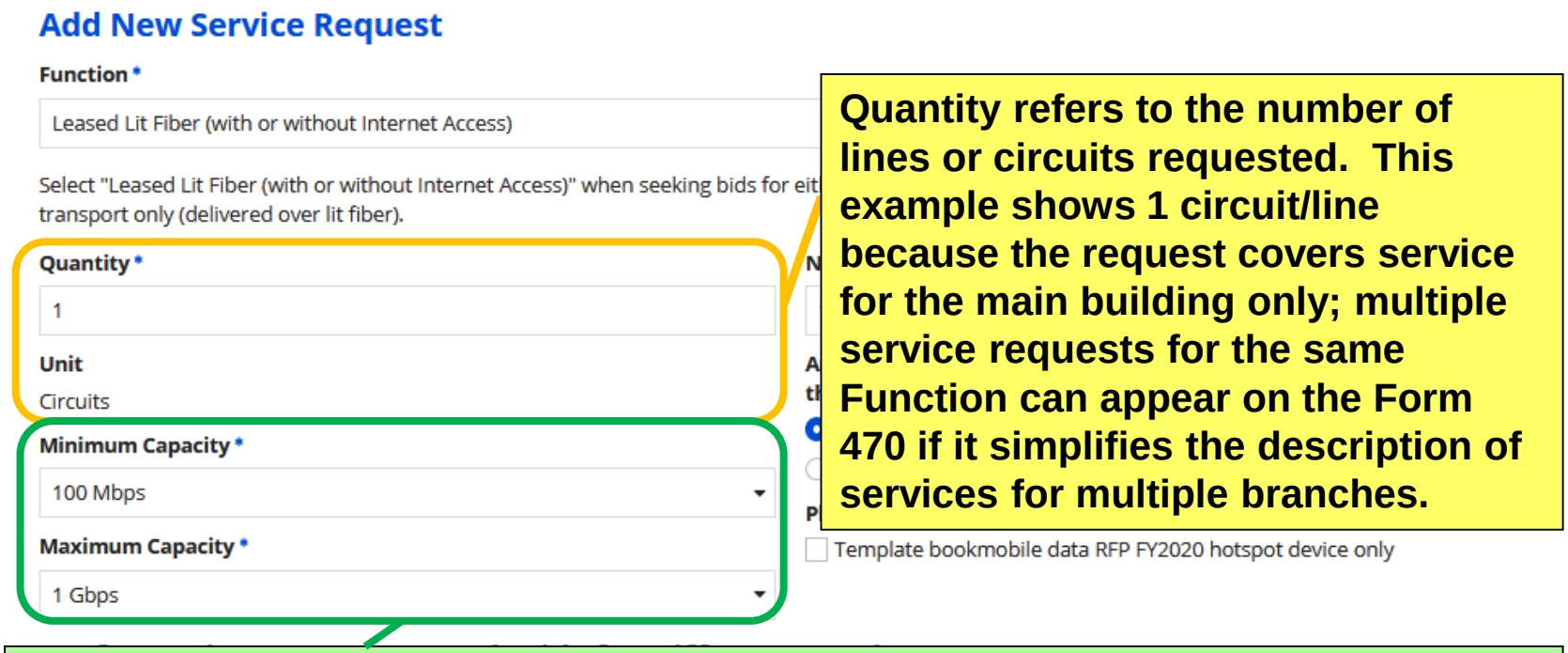


Click to open the drop-down menu for Function. Libraries must include a service request for Leased Lit Fiber (with or without Internet Access) in order to take advantage of bids for fiber internet.

More fields will appear automatically once a Function is selected.

Return to Examples – Color Coding

LEASED LIT FIBER DETAILS (1/2)

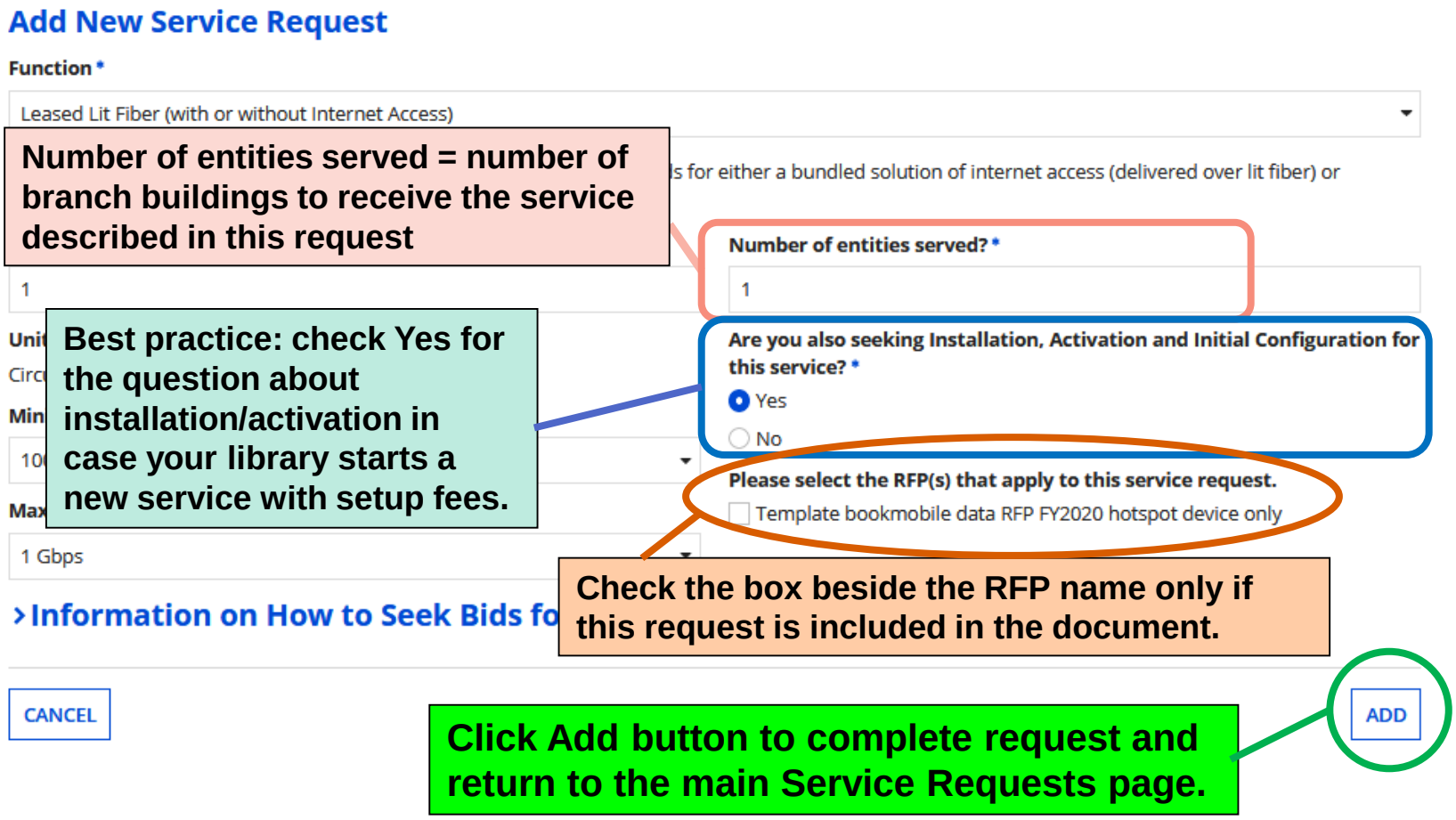


Quantity refers to the number of lines or circuits requested. This example shows 1 circuit/line because the request covers service for the main building only; multiple service requests for the same Function can appear on the Form 470 if it simplifies the description of services for multiple branches.

Minimum Capacity should reflect your library's current download speed. (Example: a library with 50x5 Mbps internet gets 50 Mbps download and 5 Mbps upload).
Maximum Capacity should reflect the highest speed your library desires (usually between 100 Mbps or 1 gigabit depending on the library branch)
Be careful about units:

- **Mbps = megabits per second.** Use this unit for most DSL or cable connections, as well as some fiber connections.
- **Gbps = gigabits per second.** Use this for very fast fiber connections.

LEASED LIT FIBER DETAILS (2/2)



FOR A BUILDING WITH FIBER SERVICE— NARRATIVE FIELD FOR LEASED LIT FIBER (WITH OR WITHOUT INTERNET ACCESS) SERVICE REQUEST

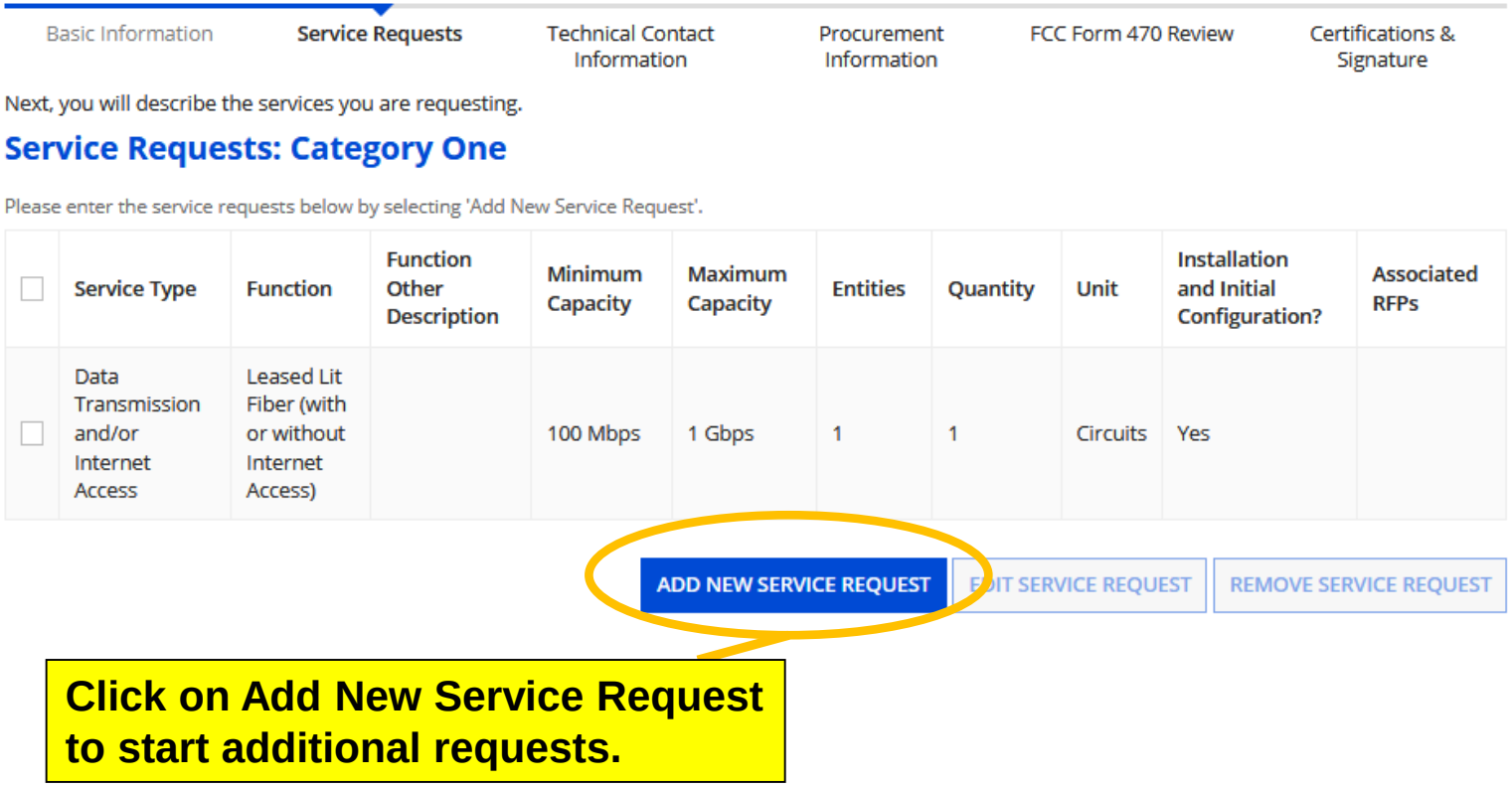
Narrative

If you would like to provide further detail about the services sought, you may do so in this box below. Examples of such further detail include specific additional capacity levels that you are seeking, additional descriptions of the services bidders should be aware of or any disqualification factors.

For all service requests, the vendor must have a Service Provider Identification Number (SPIN/Form 498 ID) or the bid will be disqualified. Generic bids for internet access (leased lit fiber or non-fiber) that do not include the service delivery address will be considered non-responsive and therefore disqualified.
SERVICE DELIVERY ADDRESSES
Pioneer County Public Library has 3 eligible entities for Category One: The Main Library located at 100 Main Street, Boonesburg, KY 41700; Loganville Branch Library located at 300 Tulip Poplar Lane, Loganville, KY 41800; and the library bookmobile which operates from the main library location.
QTY 1 CIRCUIT FOR MAIN LIBRARY, LEASED LIT FIBER BUNDLED WITH INTERNET ACCESS. The main library currently has 100x100 Mbps fiber internet; desired speed is 1 gigabit. Please quote all download speeds between 100 Mbps and 1 gigabit over a fiber circuit available for this location, fees for 5 static IP addresses, and estimated taxes and other surcharges. Preferred service start date is July 1, 2020.

For any requests where details aren't described in RFP documents, use the Narrative field to describe your library's needs. Reminder for Leased Lit Fiber requests: if your library needs fiber transport bundled with internet access, you should state this in the narrative field – *almost all Kentucky libraries have transport bundled with internet access.* See later section on Form 470 – Crafting a Narrative.

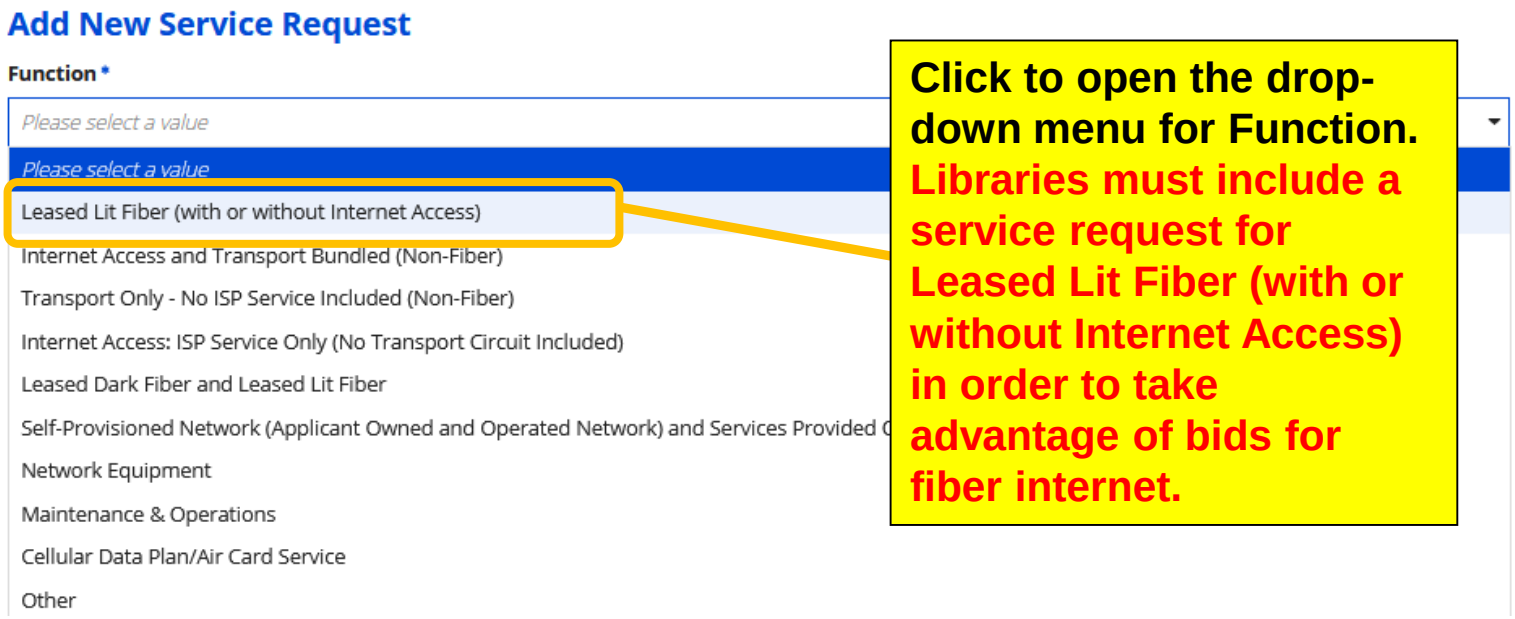
FOR A BUILDING WITH NON-FIBER SERVICE THAT COULD UPGRADE TO FIBER— FUNCTION #1: LEASED LIT FIBER



Click on Add New Service Request to start additional requests.

Return to Examples – Color Coding

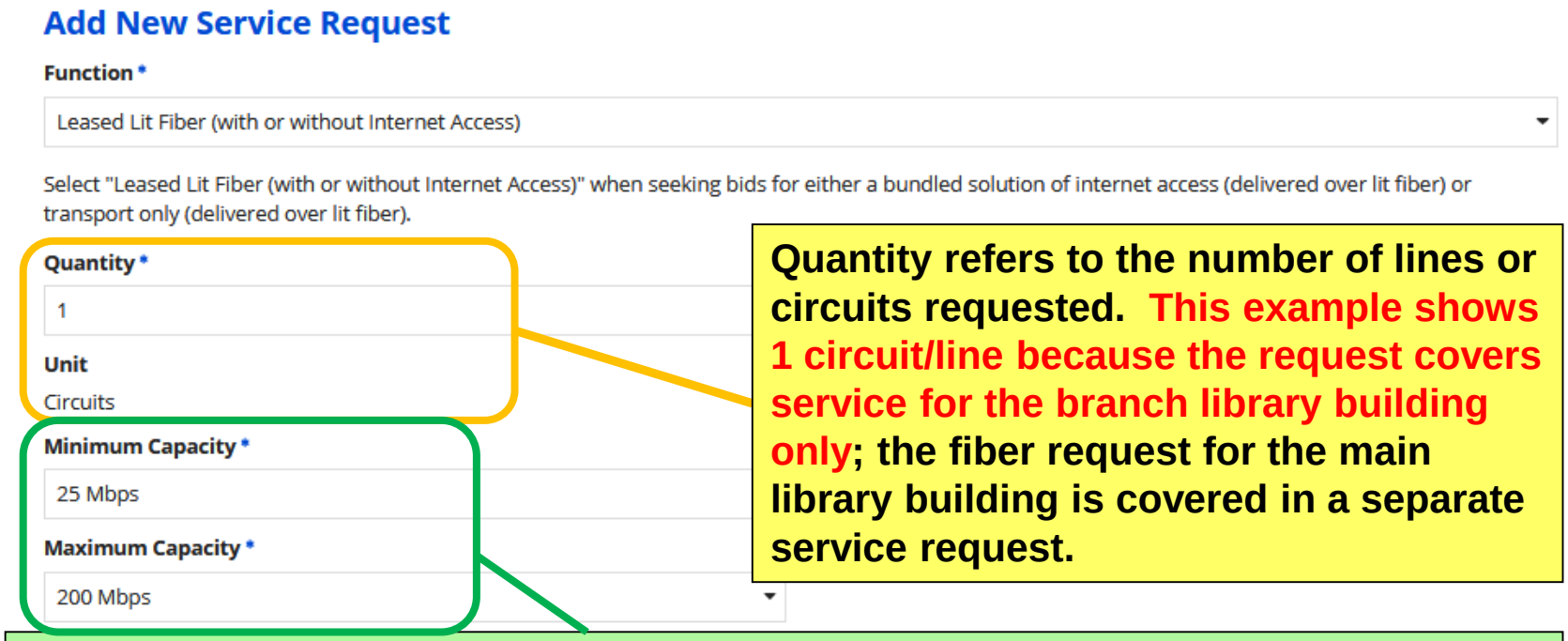
FUNCTION #1: LEASED LIT FIBER



Click to open the drop-down menu for Function. Libraries must include a service request for Leased Lit Fiber (with or without Internet Access) in order to take advantage of bids for fiber internet.

More fields will appear automatically once a Function is selected.

FUNCTION #1: LEASED LIT FIBER DETAILS (1/2)

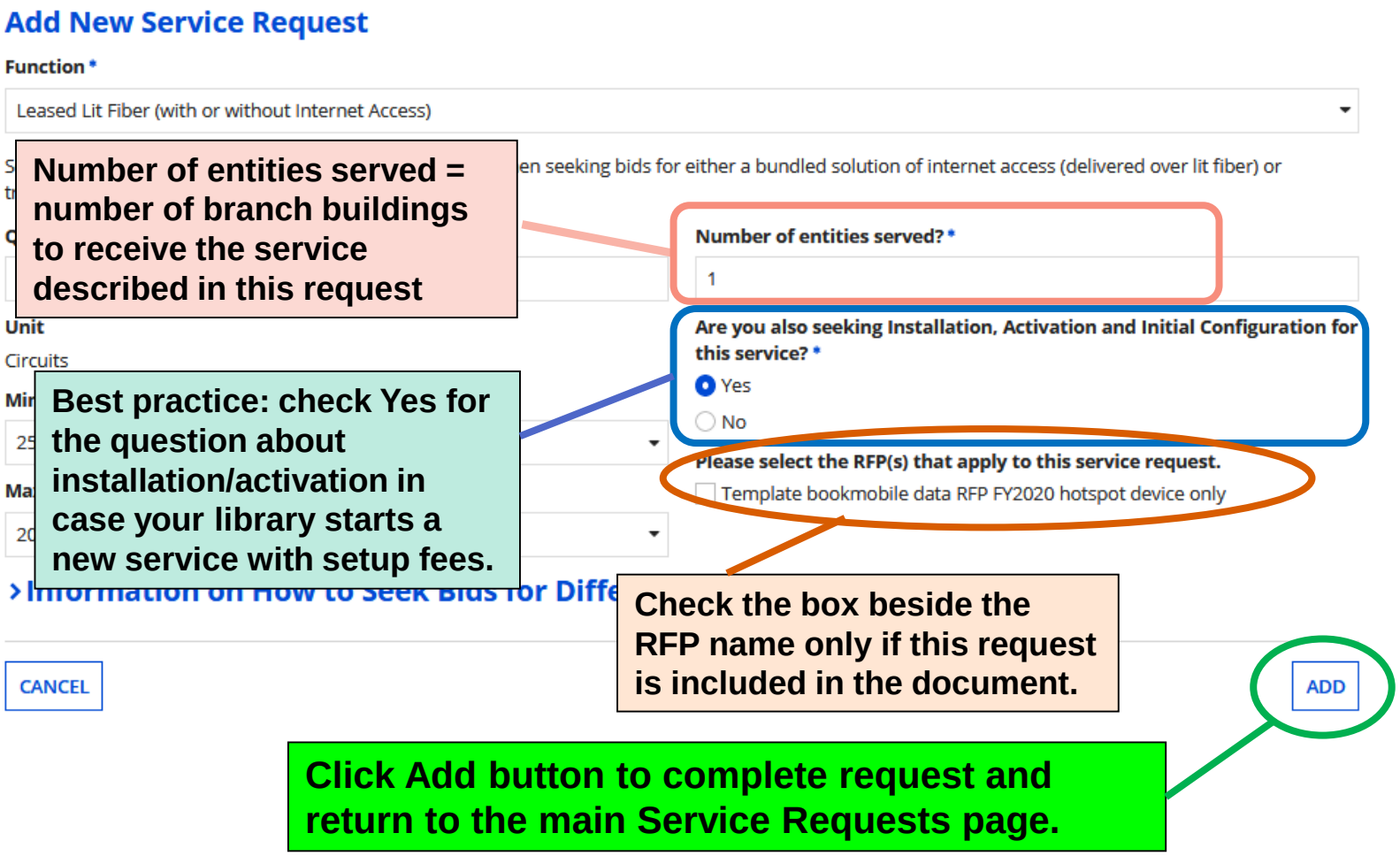


Quantity refers to the number of lines or circuits requested. This example shows 1 circuit/line because the request covers service for the branch library building only; the fiber request for the main library building is covered in a separate service request.

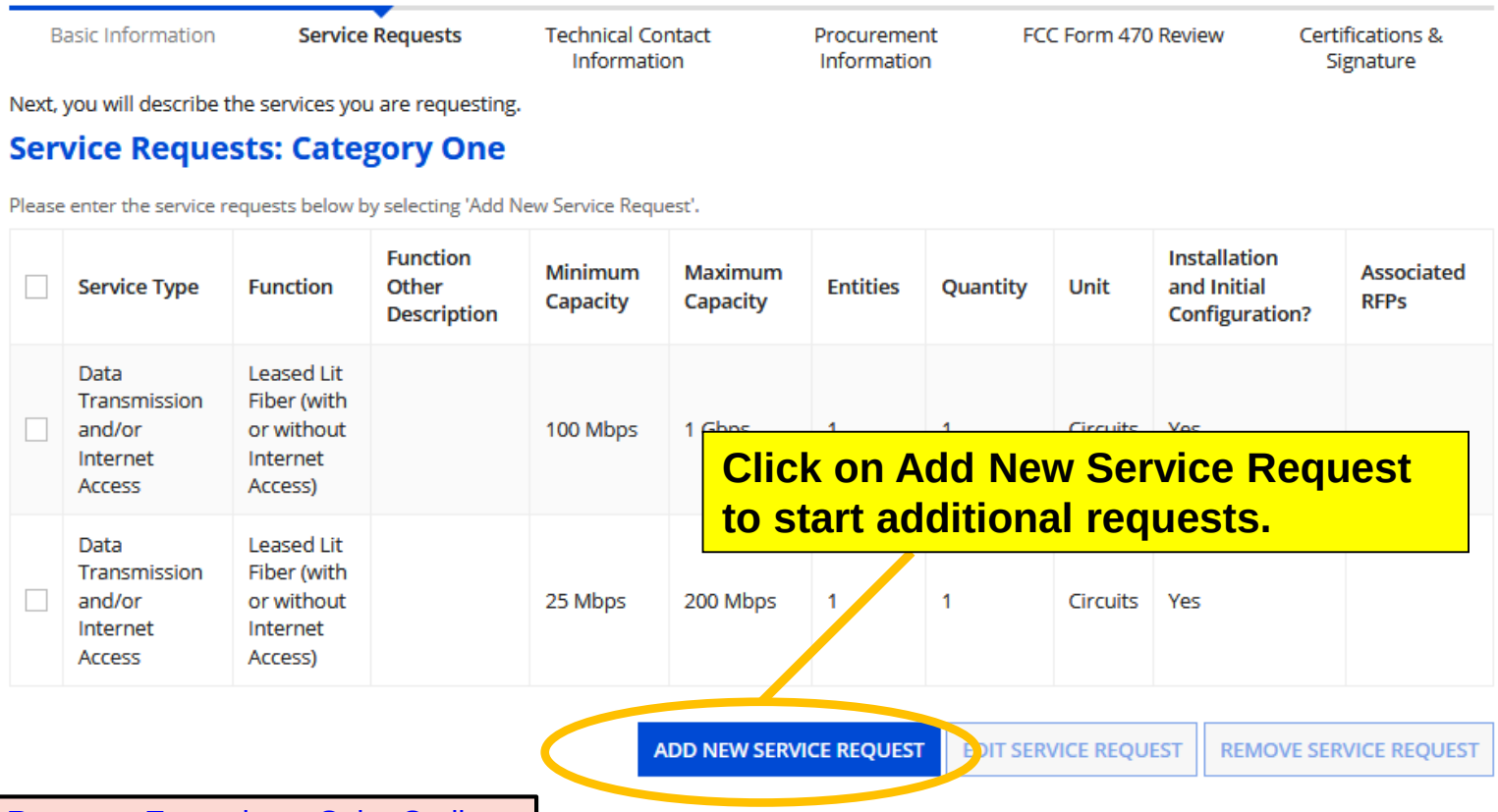
Minimum Capacity should reflect your library's current download speed. (Example: a library with 25x3 Mbps internet gets 25 Mbps download and 3 Mbps upload).
Maximum Capacity should reflect the highest speed your library desires (usually 100 Mbps or 1 gigabit depending on the library branch)
Be careful about units:

- **Mbps = megabits per second.** Use this unit for most DSL or cable connections, as well as some fiber connections.
- **Gbps = gigabits per second.** Use this for very fast fiber connections.

FUNCTION #1: LEASED LIT FIBER DETAILS (2/2)

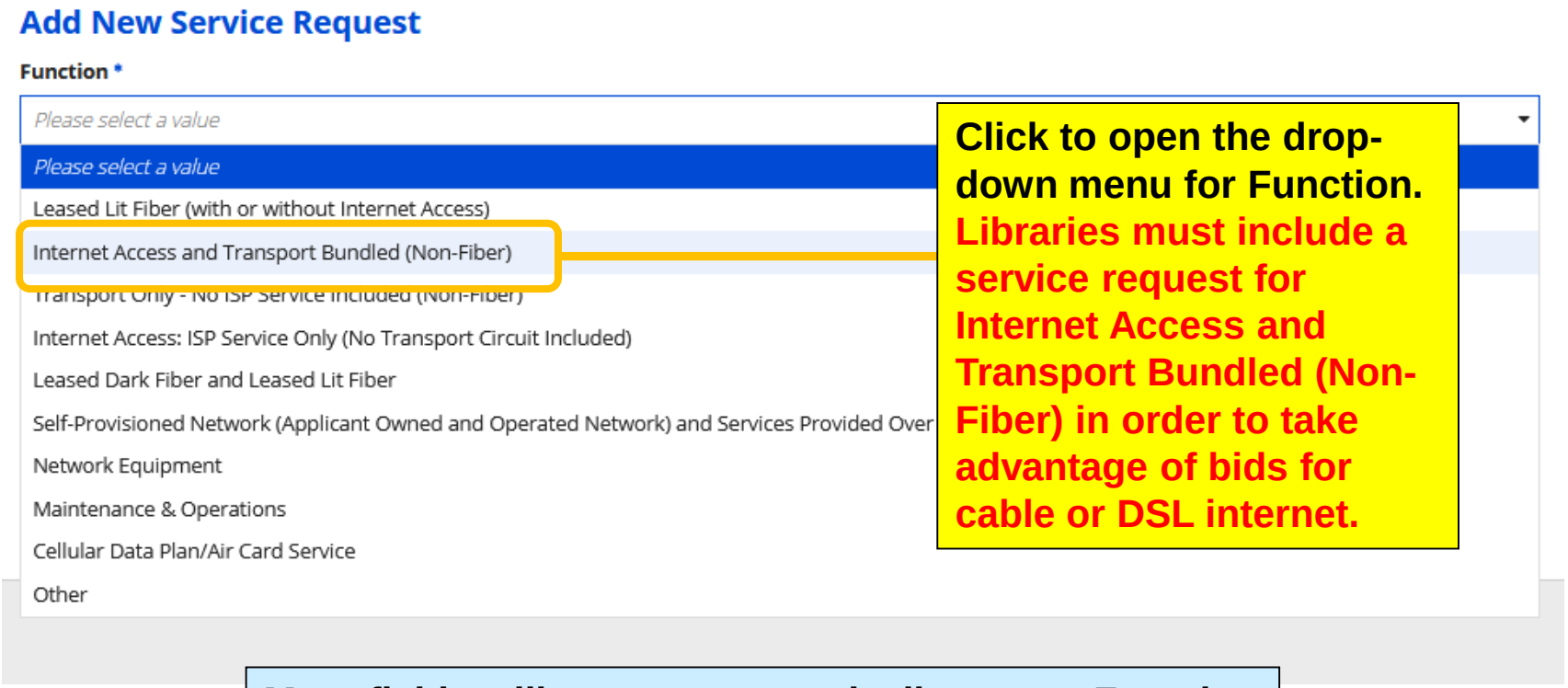


FOR A BUILDING WITH NON-FIBER SERVICE THAT COULD UPGRADE TO FIBER— FUNCTION #2: INTERNET ACCESS & TRANSPORT BUNDLED (NON-FIBER)



Return to Examples – Color Coding

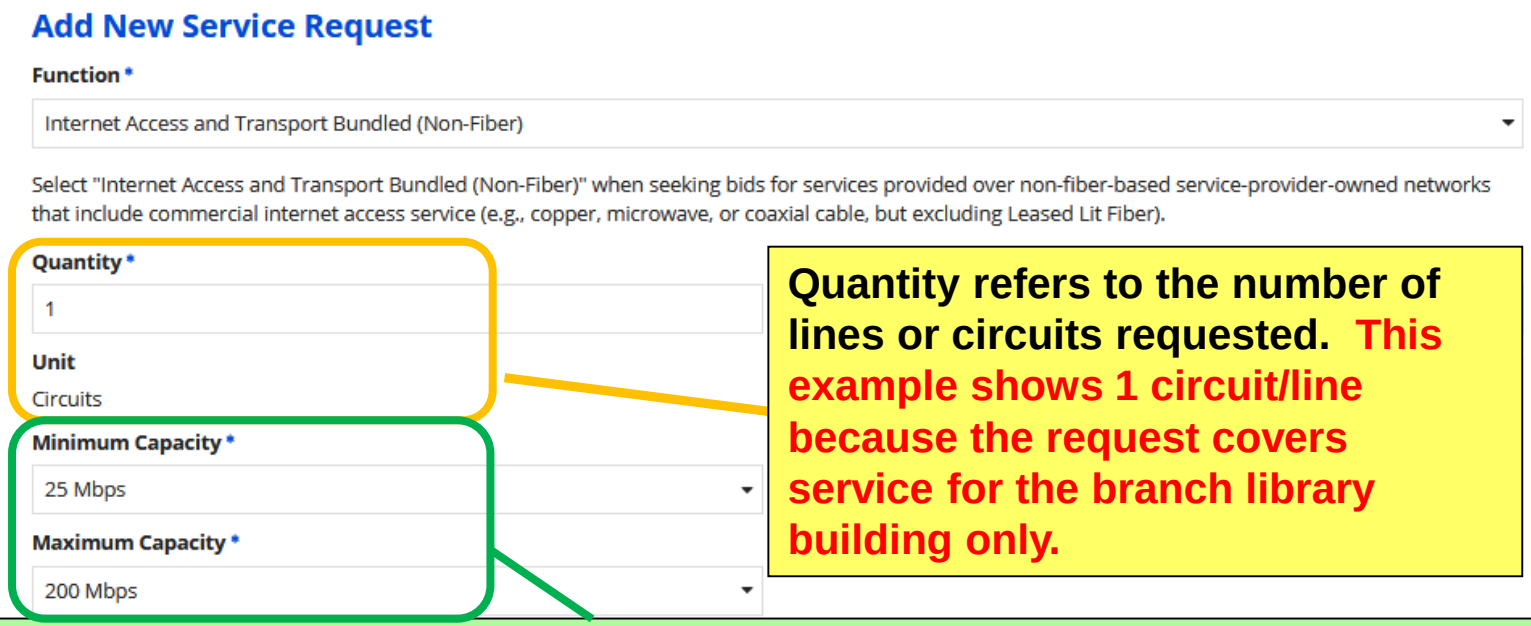
FUNCTION #2: INTERNET ACCESS & TRANSPORT BUNDLED (NON-FIBER)



Click to open the drop-down menu for Function. Libraries must include a service request for Internet Access and Transport Bundled (Non-Fiber) in order to take advantage of bids for cable or DSL internet.

More fields will appear automatically once a Function is selected.

FUNCTION #2: INTERNET ACCESS & TRANSPORT BUNDLED (NON-FIBER) DETAILS (1/2)

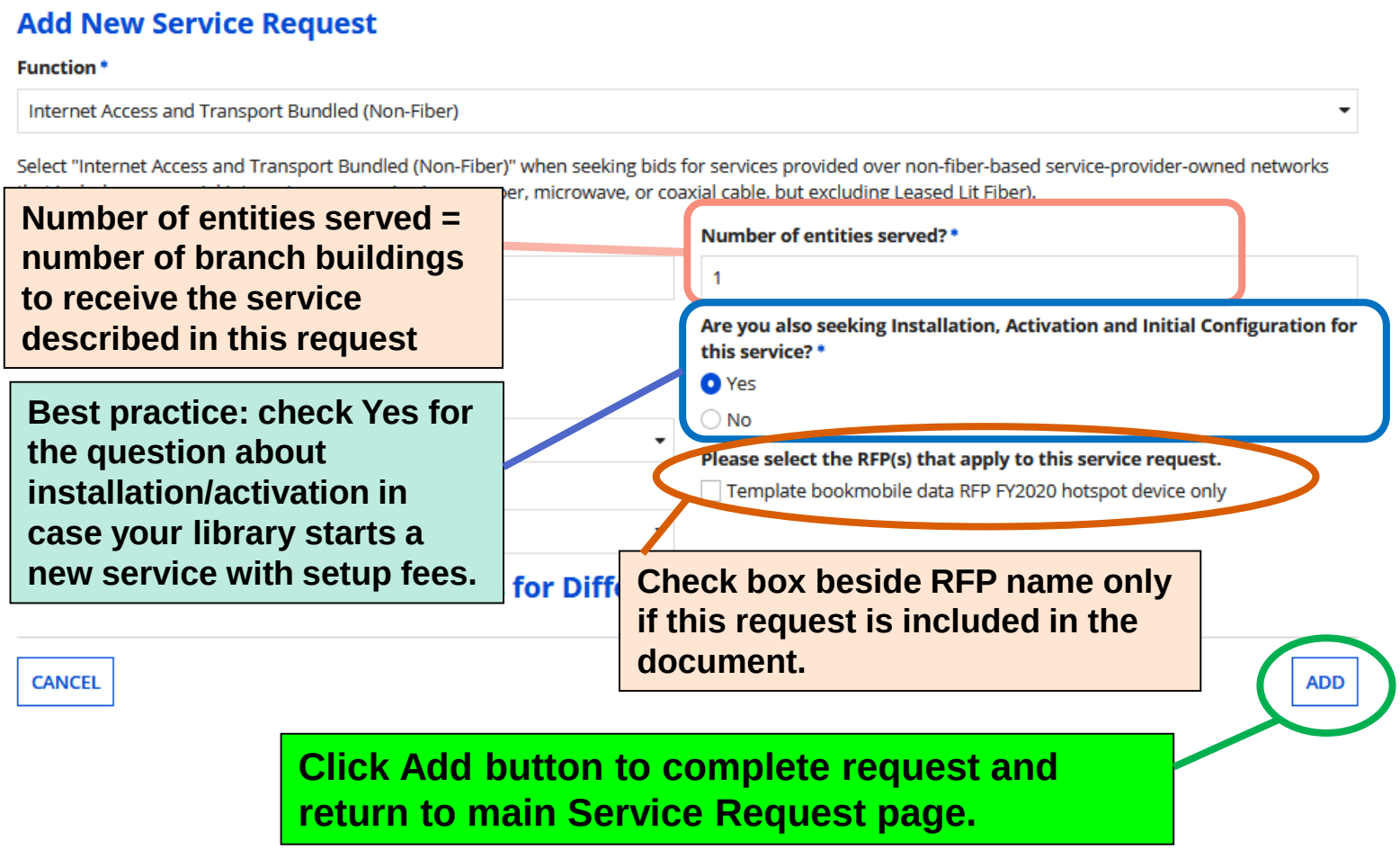


Quantity refers to the number of lines or circuits requested. This example shows 1 circuit/line because the request covers service for the branch library building only.

Minimum Capacity should reflect your library's current download speed. (Example: a library with 25x3 Mbps internet gets 25 Mbps download and 3 Mbps upload).
Maximum Capacity should reflect the highest speed your library desires (usually 100 Mbps or 1 gigabit depending on the library branch)
Be careful about units:

- **Mbps = megabits per second.** Use this unit for most DSL or cable connections, as well as some fiber connections.
- **Gbps = gigabits per second.** Use this for very fast fiber connections.

FUNCTION #2: INTERNET ACCESS & TRANSPORT BUNDLED (NON-FIBER) DETAILS (2/2)



FOR A BUILDING WITH NON-FIBER SERVICE THAT COULD UPGRADE TO FIBER—NARRATIVE FOR BOTH FIBER AND NON-FIBER SERVICE REQUESTS

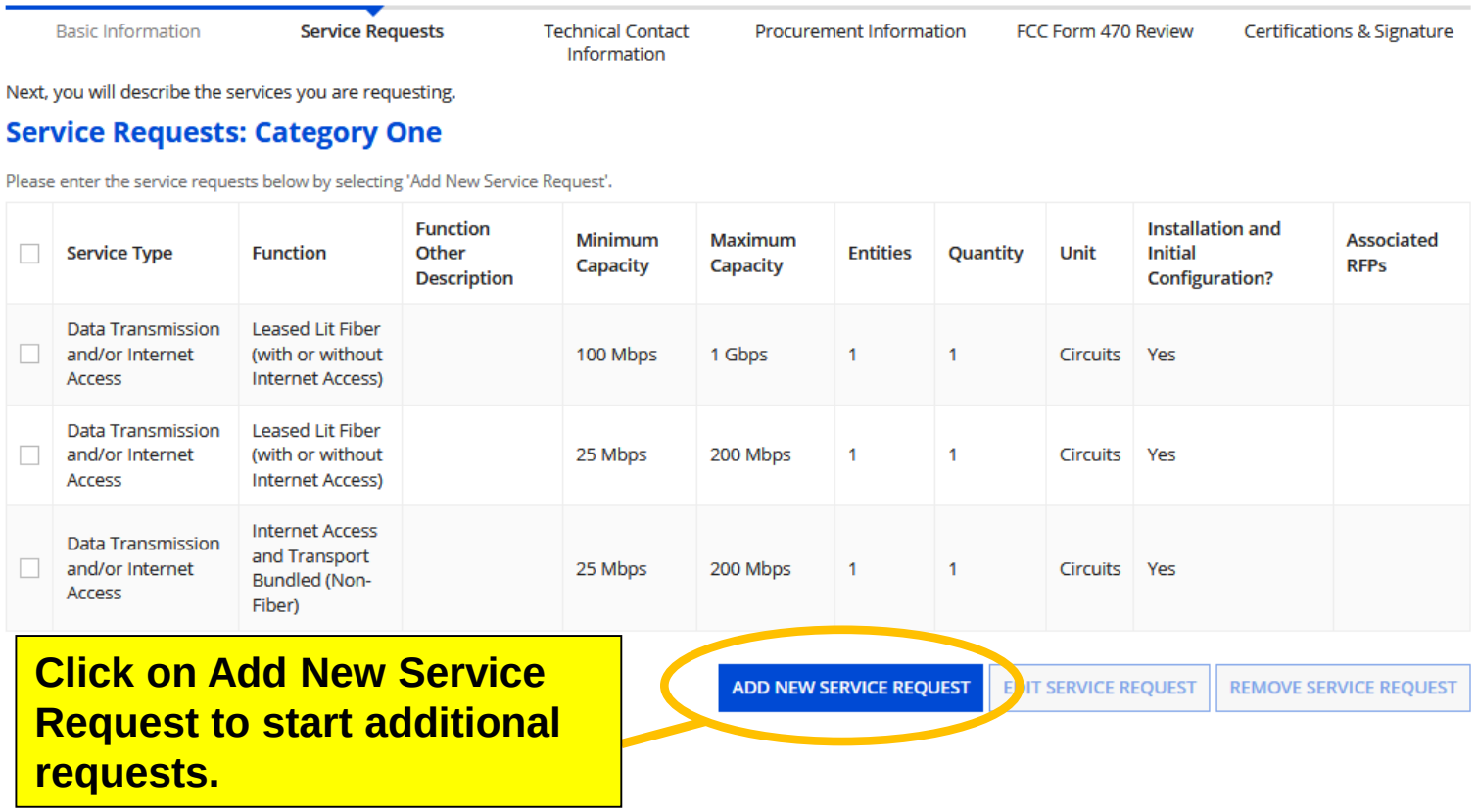
Narrative

If you would like to provide further detail about the services sought, you may do so in this box below. Examples of such further detail include specific additional capacity levels that you are seeking, additional descriptions of the services bidders should be aware of or any disqualification factors.

For all service requests, the vendor must have a Service Provider Identification Number (SPIN/Form 498 ID) or the bid will be disqualified. Generic bids for internet access (leased lit fiber or non-fiber) that do not include the service delivery address will be considered non-responsive and therefore disqualified.
SERVICE DELIVERY ADDRESSES
Pioneer County Public Library has 3 eligible entities: The Main Library located at 100 Main Street, Boonesburg, KY 41700; Loganville Branch Library located at 300 Tulip Poplar Lane, Loganville, KY 41800; and the library bookmobile which operates from the main library location.
QTY 1 CIRCUIT FOR MAIN LIBRARY, LEASED LIT FIBER BUNDLED WITH INTERNET ACCESS. The main library currently has 100x100 Mbps fiber internet; desired speed is 1 gigabit. Please quote all download speeds between 100 Mbps and 1 gigabit over a fiber circuit available for this location, fees for 5 static IP addresses, and estimated taxes and other surcharges. Preferred service start date is July 1, 2020.
QTY 1 CIRCUIT FOR LOGANVILLE BRANCH LIBRARY, INTERNET ACCESS BUNDLED WITH TRANSPORT (FIBER OR NON-FIBER). The Loganville branch currently has 25x3 Mbps cable internet; desired speed is 200 Mbps fiber internet. Please quote all download speeds between 25 Mbps and 200 Mbps with circuit (fiber or non-fiber) available for this location, fees for 5 static IP addresses, and estimated taxes and other surcharges. Preferred service start date is July 1, 2020.

For any requests where details aren't described in RFP documents, use the Narrative field to describe your library's needs. Remember: for library branches that need to consider bids for both non-fiber and fiber internet, do not state a preference for a particular type of circuit in the narrative. See later section on Form 470 – Crafting a Narrative.

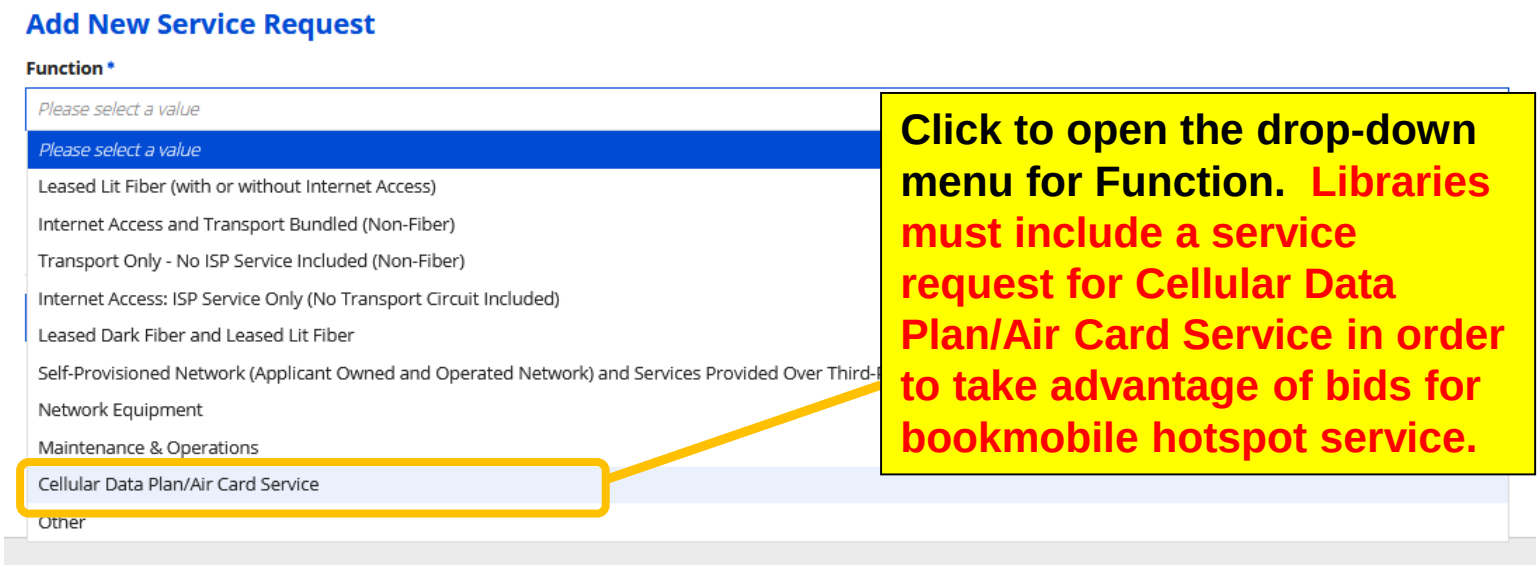
FOR BOOKMOBILES ONLY: FUNCTION: CELLULAR DATA PLAN/AIR CARD SERVICE



Click on Add New Service Request to start additional requests.

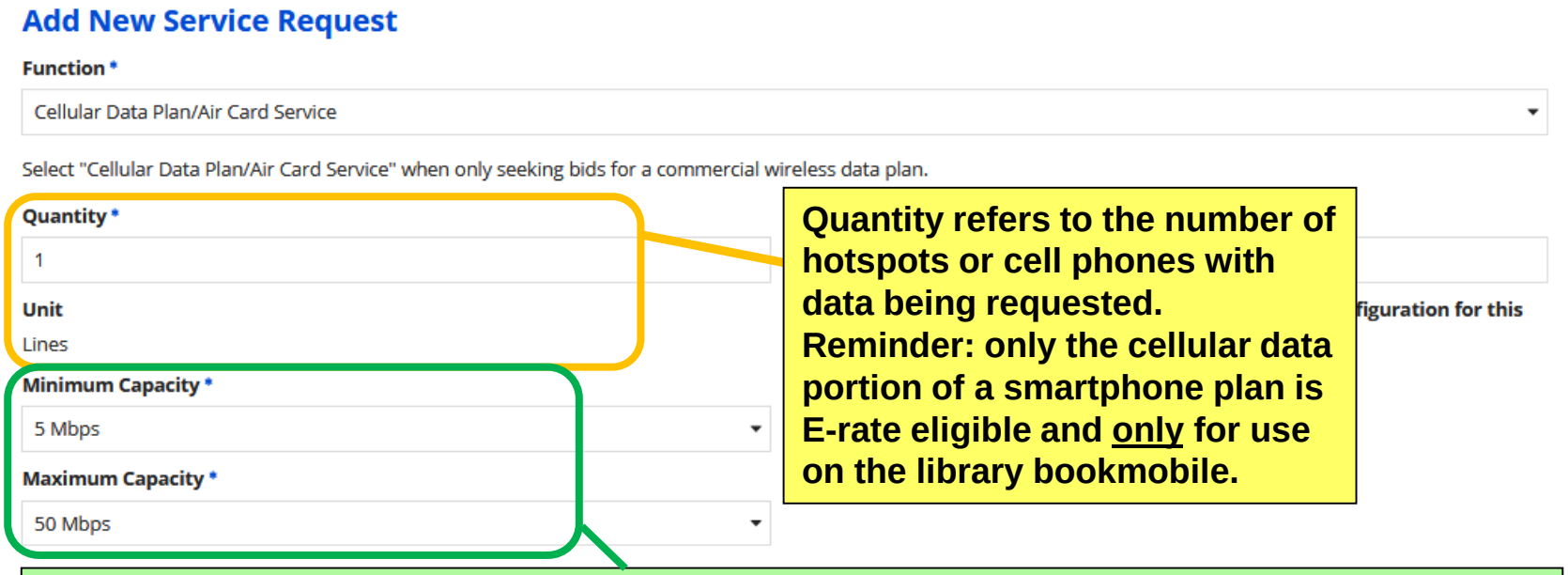
Return to Examples – Color Coding

FUNCTION: CELLULAR DATA PLAN/AIR CARD SERVICE



More fields will appear automatically once a Function is selected.

CELLULAR DATA DETAILS (1/2)



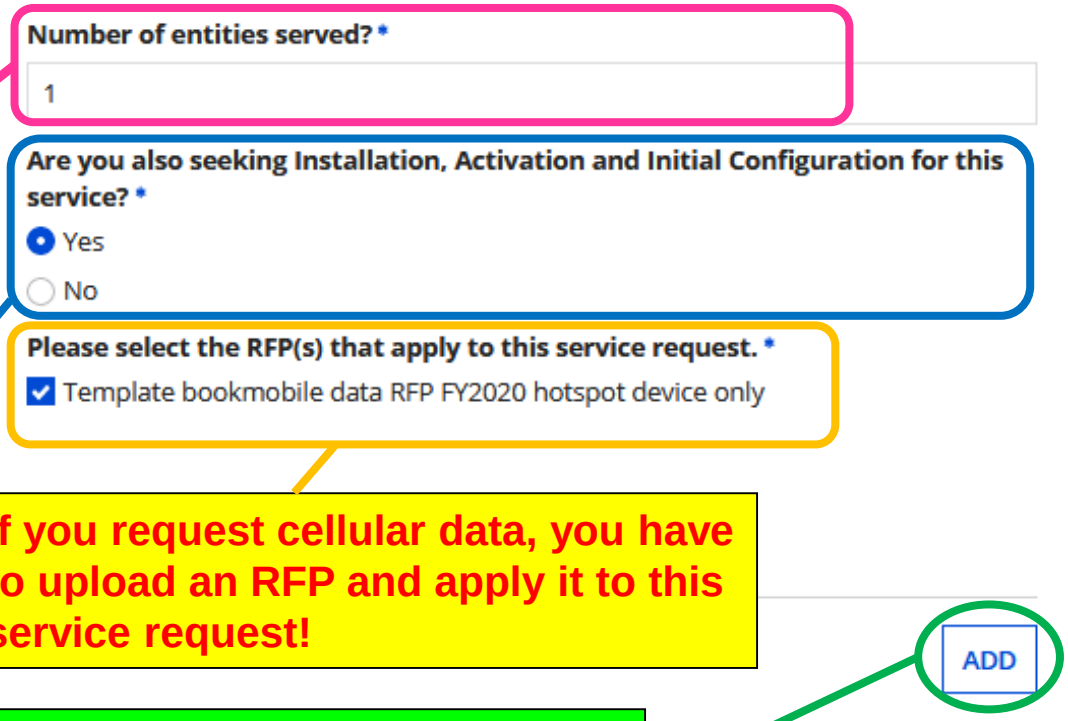
Quantity refers to the number of hotspots or cell phones with data being requested.
Reminder: only the cellular data portion of a smartphone plan is E-rate eligible and only for use on the library bookmobile.

Capacity refers to the speed of the connection, not the amount of data usage allowed each month. **While we normally talk about cellular data speeds in terms like 3G, 4G, LTE, etc., you'll have to select approximate download capacities in megabits per second (Mbps).**
Minimum Capacity: 5 Mbps
Maximum Capacity: 50 Mbps

CELLULAR DATA DETAILS (2/2)

Number of entities served = number of branch buildings (or the 'bookmobile' branch) to receive this service

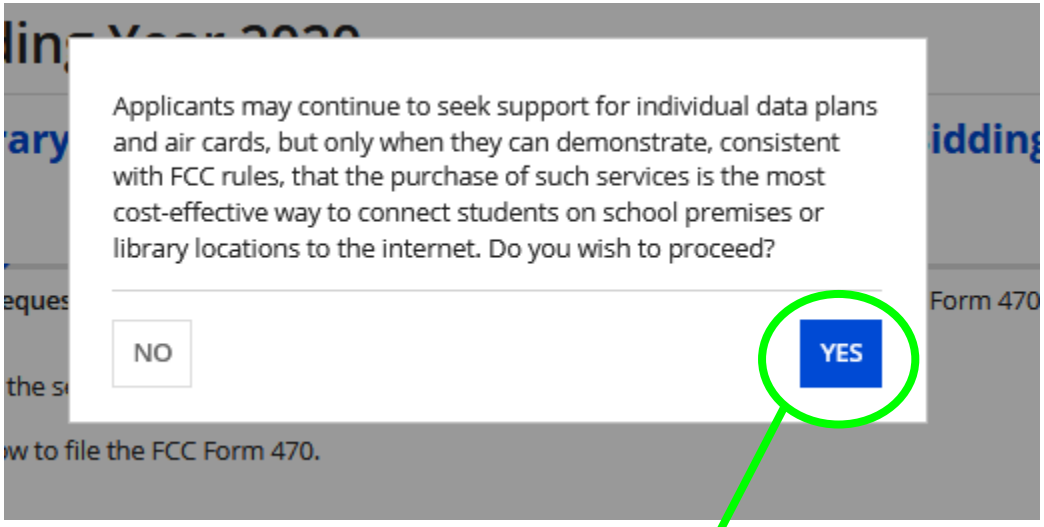
Best practice: check Yes for the question about installation/activation in case your library starts a new service with setup fees.



If you request cellular data, you have to upload an RFP and apply it to this service request!

Click Add button to complete request and return to main Service Request page.

CELLULAR DATA DETAILS – YES TO PROCEED



For Cellular Data Plan/Air Card Service requests, you must say yes to this reminder. Most library or school locations don't receive discounts on internet provided over cellular data because it's usually not a cost-effective solution for fixed locations.
BOOKMOBILES ARE THE EXCEPTION!

NARRATIVE FOR CELLULAR DATA REQUESTS

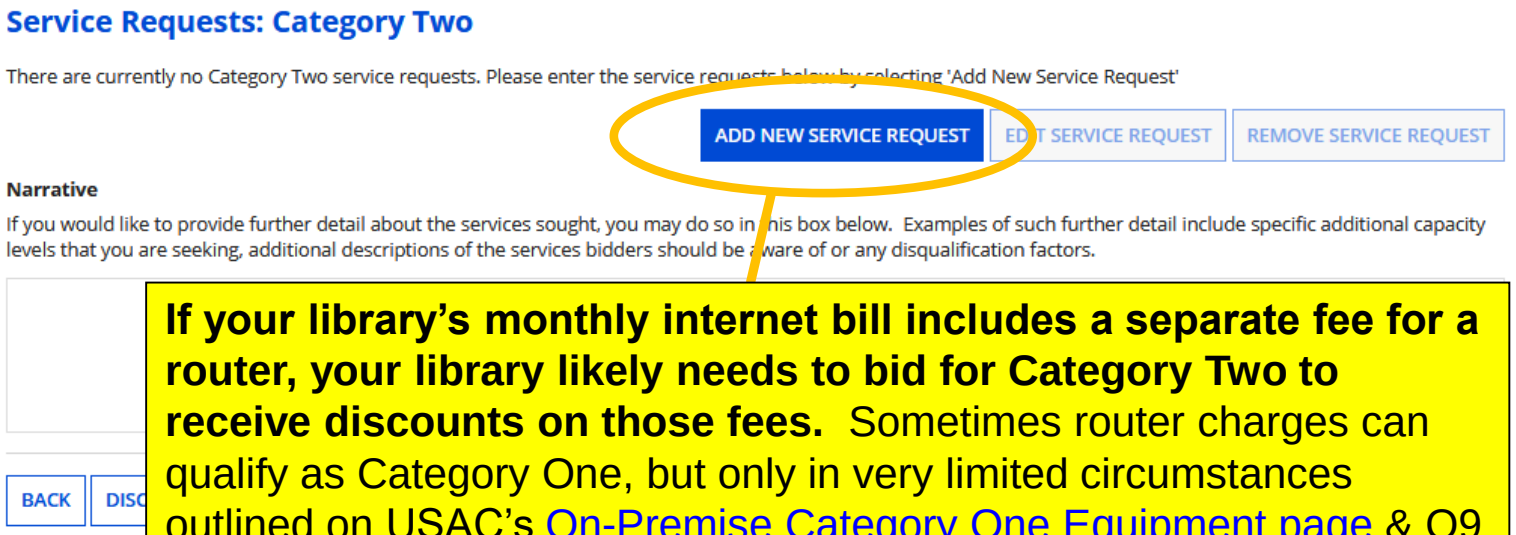
Narrative

If you would like to provide further detail about the services sought, you may do so in this box below. Examples of such further detail include specific additional capacity levels that you are seeking, additional descriptions of the services bidders should be aware of or any disqualification factors.

For all service requests, the vendor must have a Service Provider Identification Number (SPIN/Form 498 ID) or the bid will be disqualified. Generic bids for internet access (leased lit fiber or non-fiber) that do not include the service delivery address will be considered non-responsive and therefore disqualified.
SERVICE DELIVERY ADDRESSES
Pioneer County Public Library has 3 eligible entities: The Main Library located at 100 Main Street, Boonesburg, KY 41700; Loganville Branch Library located at 300 Tulip Poplar Lane, Loganville, KY 41800; and the library bookmobile which operates from the main library location.
QTY 1 CIRCUIT FOR MAIN LIBRARY, LEASED LIT FIBER BUNDLED WITH INTERNET ACCESS. The main library currently has 100x100 Mbps fiber internet; desired speed is 1 gigabit. Please quote all download speeds between 100 Mbps and 1 gigabit over a fiber circuit available for this location, fees for 5 static IP addresses, and estimated taxes and other surcharges. Preferred service start date is July 1, 2020.
QTY 1 CIRCUIT FOR LOGANVILLE BRANCH LIBRARY, INTERNET ACCESS BUNDLED WITH TRANSPORT (FIBER OR NON-FIBER). The Loganville branch currently has 25x3 Mbps cable internet; desired speed is 200 Mbps fiber internet. Please quote all download speeds between 25 Mbps and 200 Mbps with circuit (fiber or non-fiber) available for this location, fees for 5 static IP addresses, and estimated taxes and other surcharges. Preferred service start date is July 1, 2020.
QTY 1 HOTSPOT FOR BOOKMOBILE, CELLULAR DATA PLAN/AIR CARD SERVICE. Please see RFP document for details of this request. Preferred service start date is July 1, 2020.

The RFP for Cellular Data Plan/Air Card Service must include details about the service, but basic information can be included in the narrative field. When using an RFP for any type of service request, it's always good to add a note in the narrative field to "see the RFP for details".

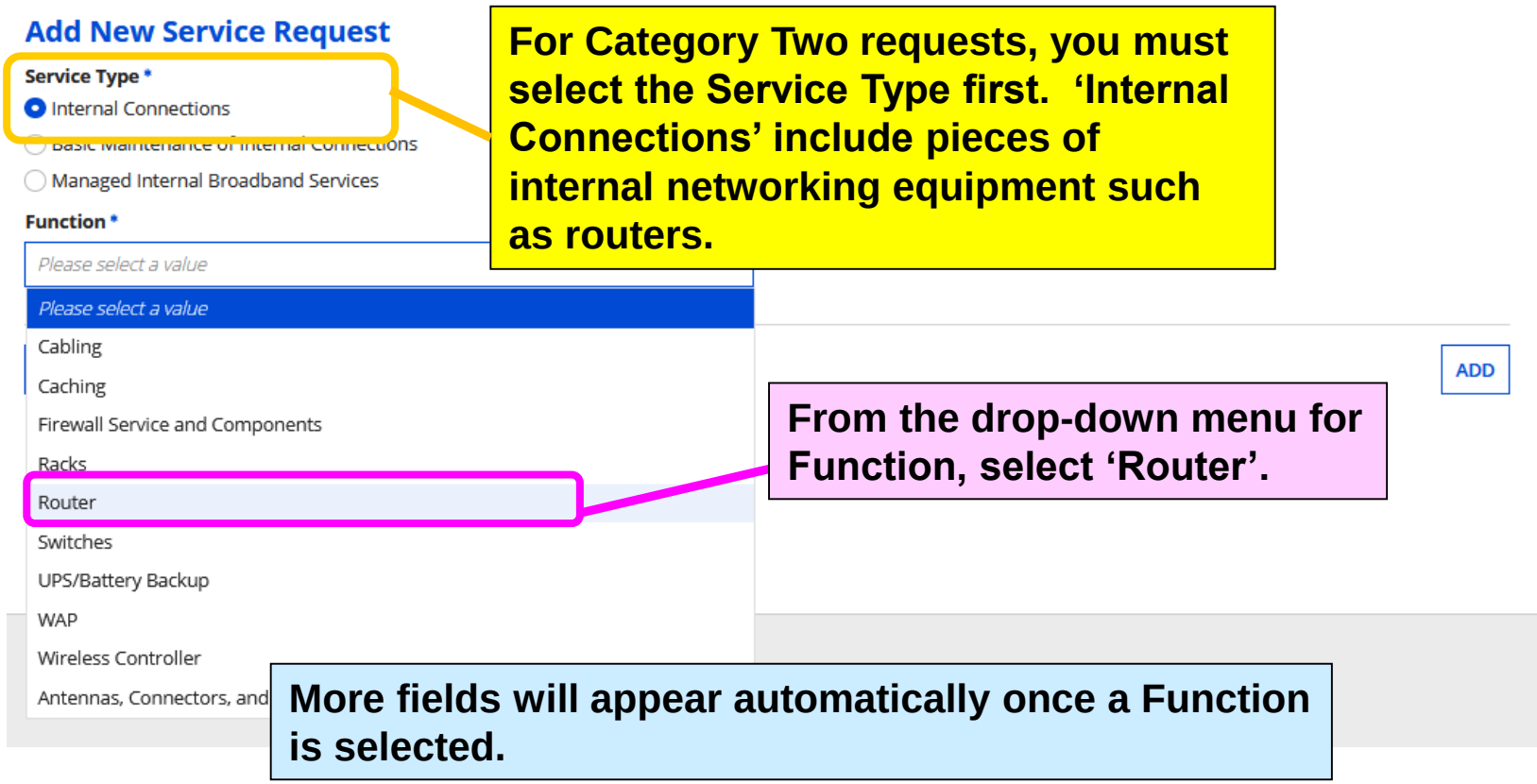
FOR ROUTER LEASE FROM INTERNET SERVICE PROVIDER
CATEGORY TWO SERVICE TYPE: INTERNAL CONNECTIONS; FUNCTION: ROUTER



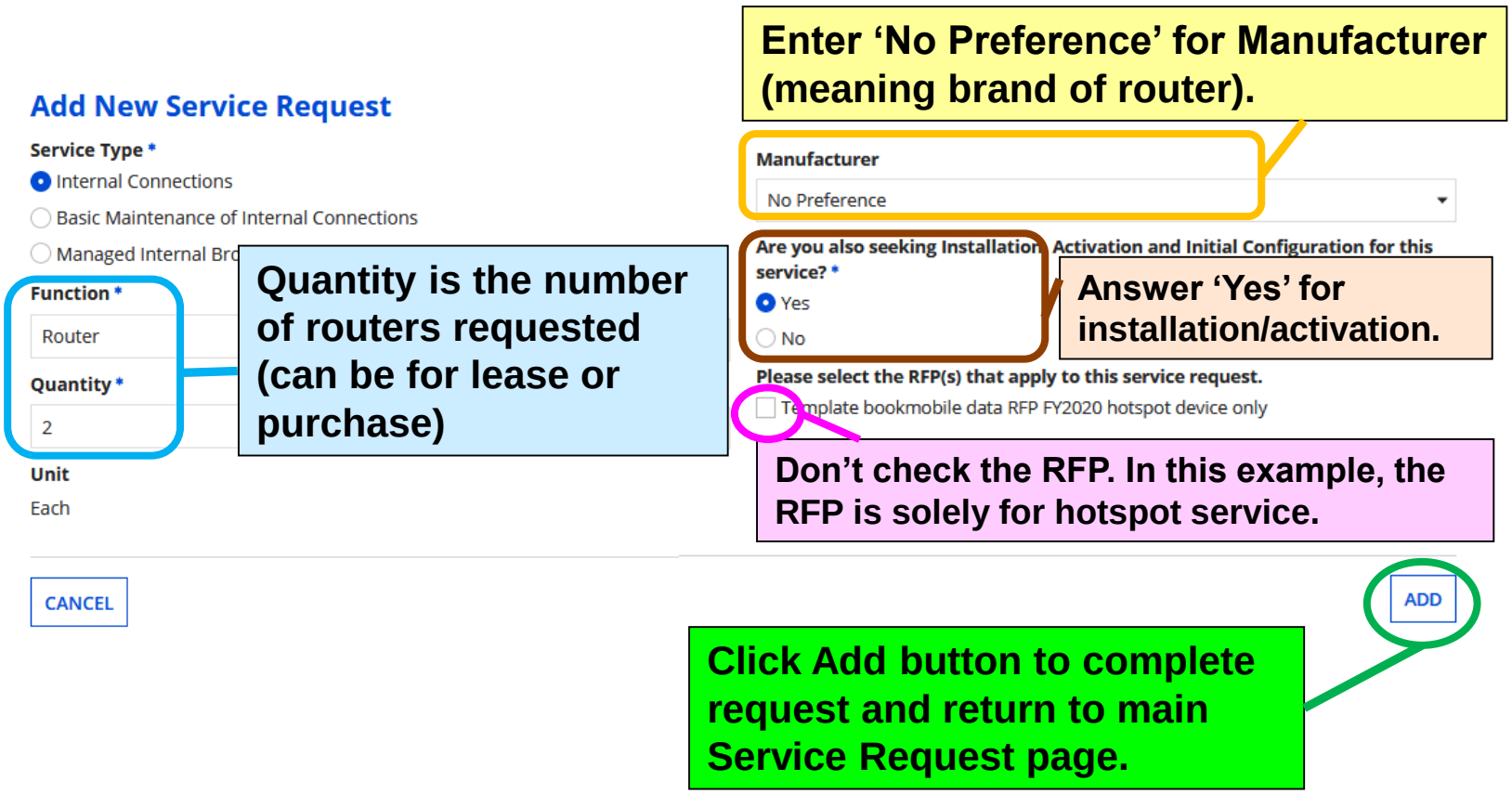
If your library's monthly internet bill includes a separate fee for a router, your library likely needs to bid for Category Two to receive discounts on those fees. Sometimes router charges can qualify as Category One, but only in very limited circumstances outlined on USAC's On-Premise Category One Equipment page & Q9 of FAQs: Eligible Fiber Services

Return to Examples – Color Coding

CATEGORY TWO SERVICE TYPE: INTERNAL CONNECTIONS; FUNCTION: ROUTER

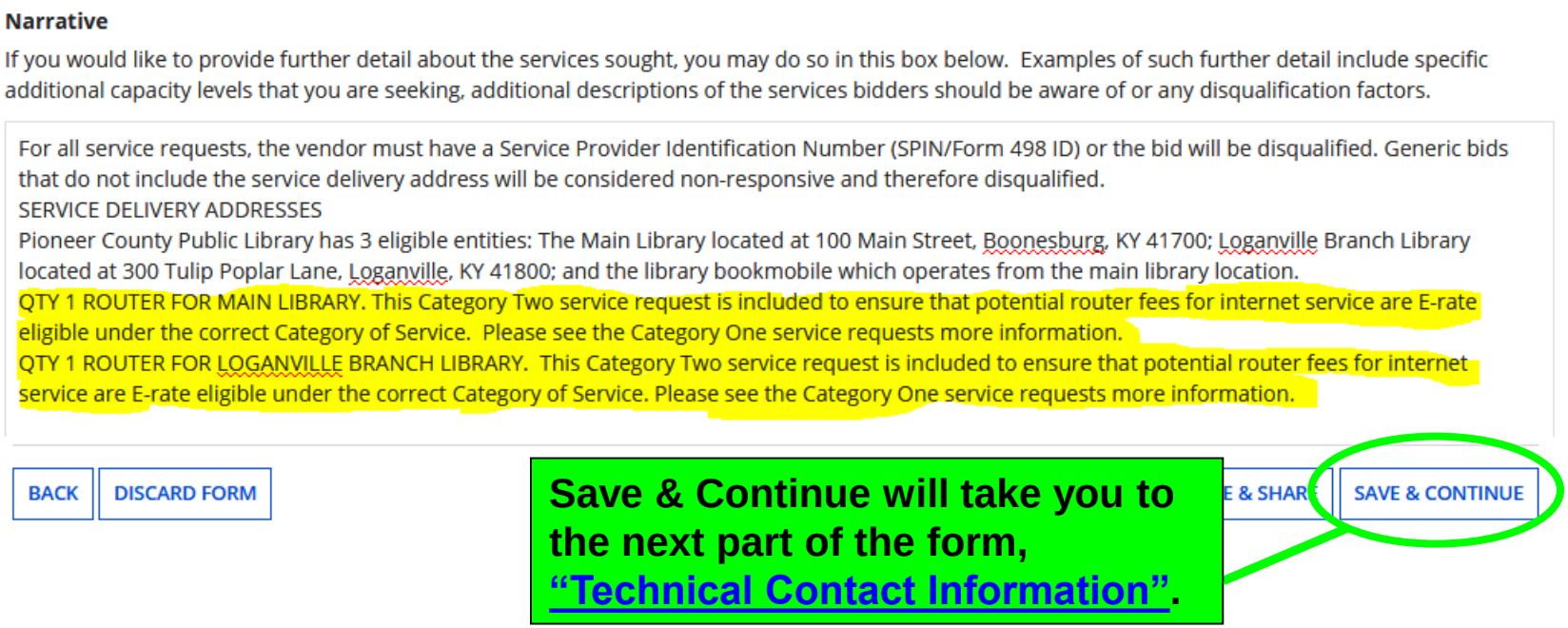


CATEGORY TWO SERVICE TYPE: INTERNAL CONNECTIONS; FUNCTION: ROUTER



NARRATIVE FOR ROUTER REQUEST

In the narrative, indicate that the router service requests are related to the internet service requests under Category One. For more information on narratives, see the Form 470: Crafting a Narrative section.



Narrative

If you would like to provide further detail about the services sought, you may do so in this box below. Examples of such further detail include specific additional capacity levels that you are seeking, additional descriptions of the services bidders should be aware of or any disqualification factors.

For all service requests, the vendor must have a Service Provider Identification Number (SPIN/Form 498 ID) or the bid will be disqualified. Generic bids that do not include the service delivery address will be considered non-responsive and therefore disqualified.
SERVICE DELIVERY ADDRESSES
Pioneer County Public Library has 3 eligible entities: The Main Library located at 100 Main Street, Boonesburg, KY 41700; Loganville Branch Library located at 300 Tulip Poplar Lane, Loganville, KY 41800; and the library bookmobile which operates from the main library location.
QTY 1 ROUTER FOR MAIN LIBRARY. This Category Two service request is included to ensure that potential router fees for internet service are E-rate eligible under the correct Category of Service. Please see the Category One service requests more information.
QTY 1 ROUTER FOR LOGANVILLE BRANCH LIBRARY. This Category Two service request is included to ensure that potential router fees for internet service are E-rate eligible under the correct Category of Service. Please see the Category One service requests more information.

BACK | DISCARD FORM | E & SHAR | SAVE & CONTINUE

Save & Continue will take you to the next part of the form, "Technical Contact Information".

FORM 470: CRAFTING A NARRATIVE

Return to Presentation Contents

NARRATIVE – ADVANTAGES

- The narrative field is your opportunity to explain your library's current situation and future needs. You can receive more accurate bids and anticipate questions vendors may have.
- A detailed narrative field also helps KDLA's Technology Consultant when reviewing draft PDF versions of your form. If your narrative description doesn't match the service requests listed, she can help you fix those issues.

WHAT TO INCLUDE IN THE NARRATIVE (1/2)

- NOT an exhaustive list:
  - **Contract dates** – When does your library need this service to start? Most libraries request services that start on July 1st (first date for service in the funding year). Definitely include a date if your library's current contract ends mid-year.
  - **Internet speeds and static IP addresses** – What are the minimum download and upload speeds you're seeking? Do you need static IP addresses, too?
  - **Internet access and/or transport?** – You may need to mention that your library is seeking internet access & transport bundled together – see the USAC Form 470 Category One reference table.
  - **Addresses** – Including addresses makes it easier for service providers to determine whether they can provide the requested service at those locations. Also, make sure to mention if a branch will move (temporarily or permanently) during the funding year due to construction.

WHAT TO INCLUDE IN THE NARRATIVE (2/2)

- NOT an exhaustive list (continued):
  - **Bidding** – Are there requirements for the formatting of bids or the method for submitting bids? Examples: separating costs by line item; bids to be submitted by email only; sealed bids to be delivered by mail or in person by a certain date/time
  - **Compatible equipment** – If you're requesting Category Two products/services, must the proposed equipment be compatible with other library-owned equipment? What features/specs are most important?
  - **Disqualification factors** – Does the service provider have a Service Provider Identification Number (SPIN/Form 498 ID)?
    - Disqualification factors must be clearly listed on the Form 470 (and/or in RFP document) & must be binary (Yes or No answers)
  - The narrative field is limited to 5,000 characters. If you need more space to describe your needs, considering uploading an RFP document.

EXAMPLE NARRATIVE – CAT1

GENERAL INFORMATION ABOUT THE LIBRARY AND BIDDING

For all service requests, the vendor must have a Service Provider Identification Number (SPIN/Form 498 ID) or the bid will be disqualified. Generic bids for internet access (leased lit fiber or non-fiber) that do not include the service delivery address will be considered non-responsive and therefore disqualified.

SERVICE DELIVERY ADDRESSES

Pioneer County Public Library has 3 eligible entities: The Main Library located at 100 Main Street, Boonesburg, KY 41700; Loganville Branch Library located at 300 Tulip Poplar Lane, Loganville, KY 41800; and the library bookmobile which operates from the main library location.

INTERNET SERVICE REQUESTS FOR BRANCH BUILDINGS

QTY 1 CIRCUIT FOR MAIN LIBRARY, LEASED LIT FIBER BUNDLED WITH INTERNET ACCESS. The main library currently has 100x100 Mbps fiber internet; desired speed is 1 gigabit. Please quote all download speeds between 100 Mbps and 1 gigabit over a fiber circuit available for this location, fees for 5 static IP addresses, and estimated taxes and other surcharges. Preferred service start date is July 1, 2020.

QTY 1 CIRCUIT FOR LOGANVILLE BRANCH LIBRARY, INTERNET ACCESS BUNDLED WITH TRANSPORT (FIBER OR NON-FIBER). The Loganville branch currently has 25x3 Mbps cable internet; desired speed is 200 Mbps fiber internet. Please quote all download speeds between 25 Mbps and 200 Mbps with circuit (fiber or non-fiber) available for this location, fees for 5 static IP addresses, and estimated taxes and other surcharges. Preferred service start date is July 1, 2020.

BOOKMOBILE HOTSPOT SERVICE REQUEST

QTY 1 HOTSPOT FOR BOOKMOBILE, CELLULAR DATA PLAN/AIR CARD SERVICE. Please see RFP document for details of this request. Preferred service start date is July 1, 2020.

PHONE SERVICE REQUEST (NOT ELIGIBLE FOR E-RATE DISCOUNTS)

PHONE SERVICE FOR MAIN BRANCH AND LOGANVILLE BRANCH (NOT ELIGIBLE FOR E-RATE DISCOUNTS). The library system currently has 14 analog phone lines for local/long distance; 10 lines at the main library and 4 at the Loganville Branch. Please provide bids for phone service for both locations.

EXAMPLE NARRATIVE – CAT2

GENERAL INFORMATION ABOUT THE LIBRARY AND BIDDING

For all service requests, the vendor must have a Service Provider Identification Number (SPIN/Form 498 ID) or the bid will be disqualified. Generic bids that do not include the service delivery address will be considered non-responsive and therefore disqualified.

SERVICE DELIVERY ADDRESSES

Pioneer County Public Library has 3 eligible entities: The Main Library located at 100 Main Street, Boonesburg, KY 41700; Loganville Branch Library located at 300 Tulip Poplar Lane, Loganville, KY 41800; and the library bookmobile which operates from the main library location.

ROUTER SERVICE REQUESTS

QTY 1 ROUTER FOR MAIN LIBRARY. This Category Two service request is included to ensure that potential router fees for internet service are E-rate eligible under the correct Category of Service. Please see the Category One service requests more information.

QTY 1 ROUTER FOR LOGANVILLE BRANCH LIBRARY. This Category Two service request is included to ensure that potential router fees for internet service are E-rate eligible under the correct Category of Service. Please see the Category One service requests more information.

FORM 470: TECH CONTACT & STATE/LOCAL PROCUREMENT

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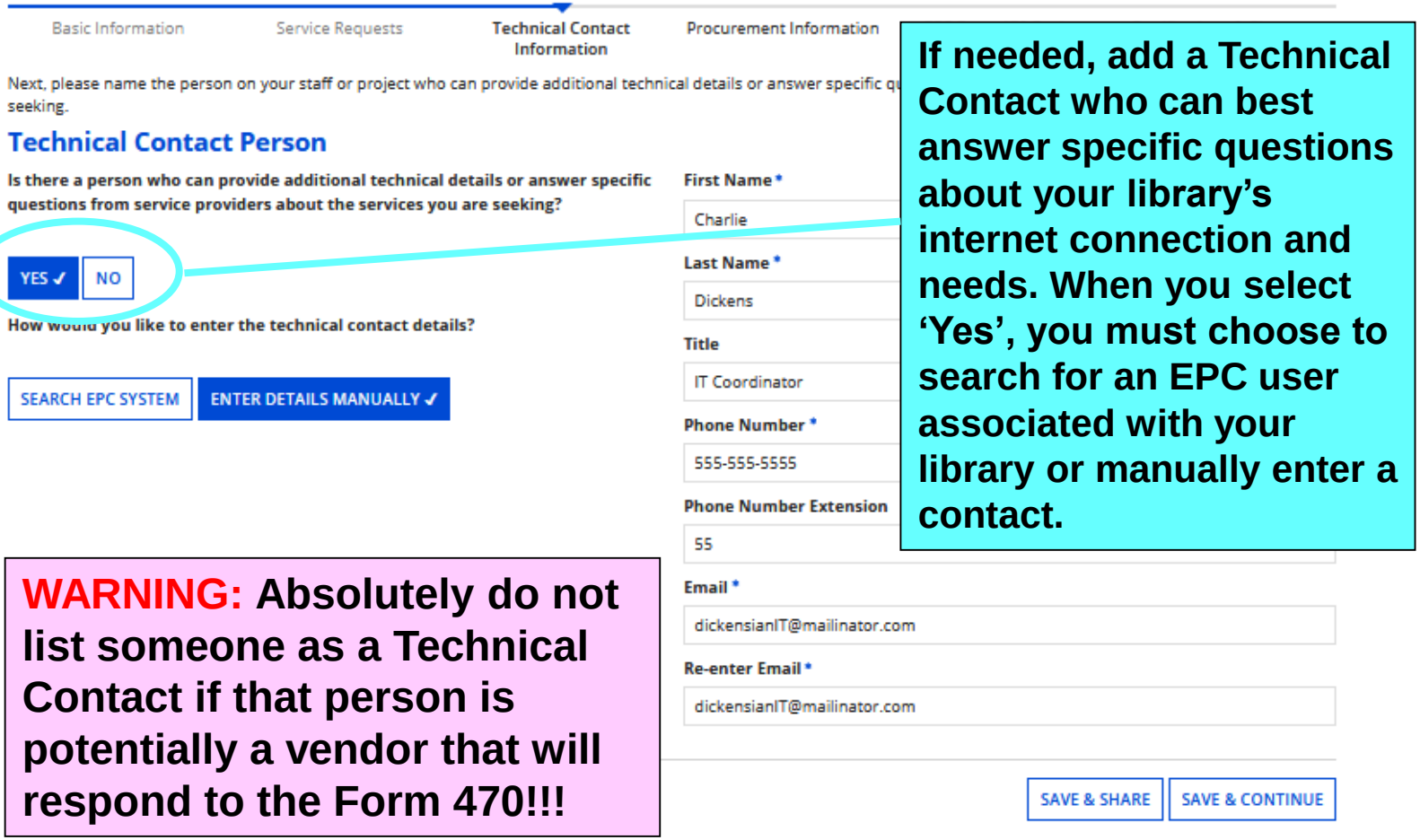
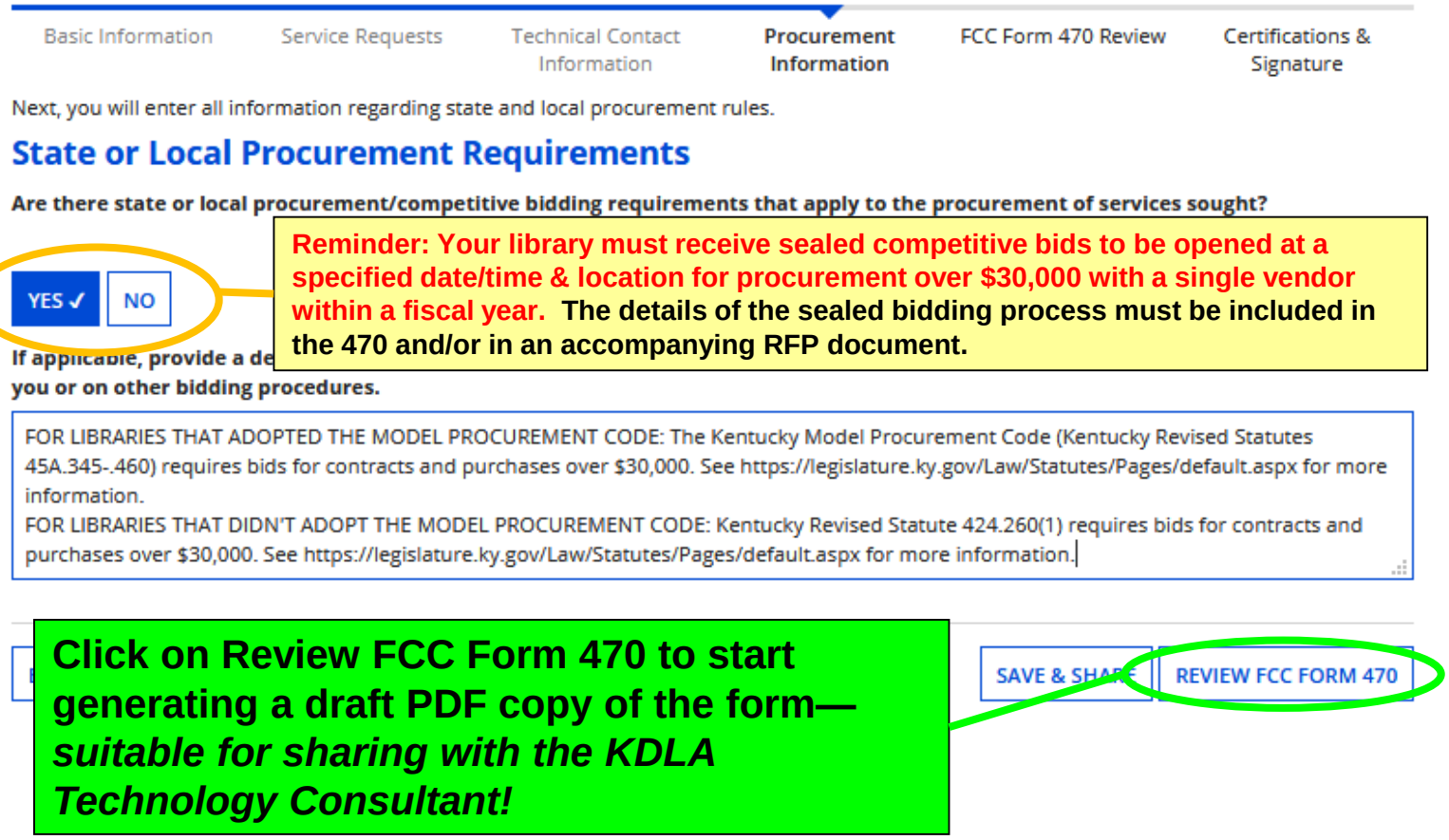
TECHNICAL CONTACT PERSON



If needed, add a Technical Contact who can best answer specific questions about your library's internet connection and needs. When you select 'Yes', you must choose to search for an EPC user associated with your library or manually enter a contact.

WARNING: Absolutely do not list someone as a Technical Contact if that person is potentially a vendor that will respond to the Form 470!!!

STATE OR LOCAL PROCUREMENT REQUIREMENTS



FORM 470: REVIEW & CERTIFICATION

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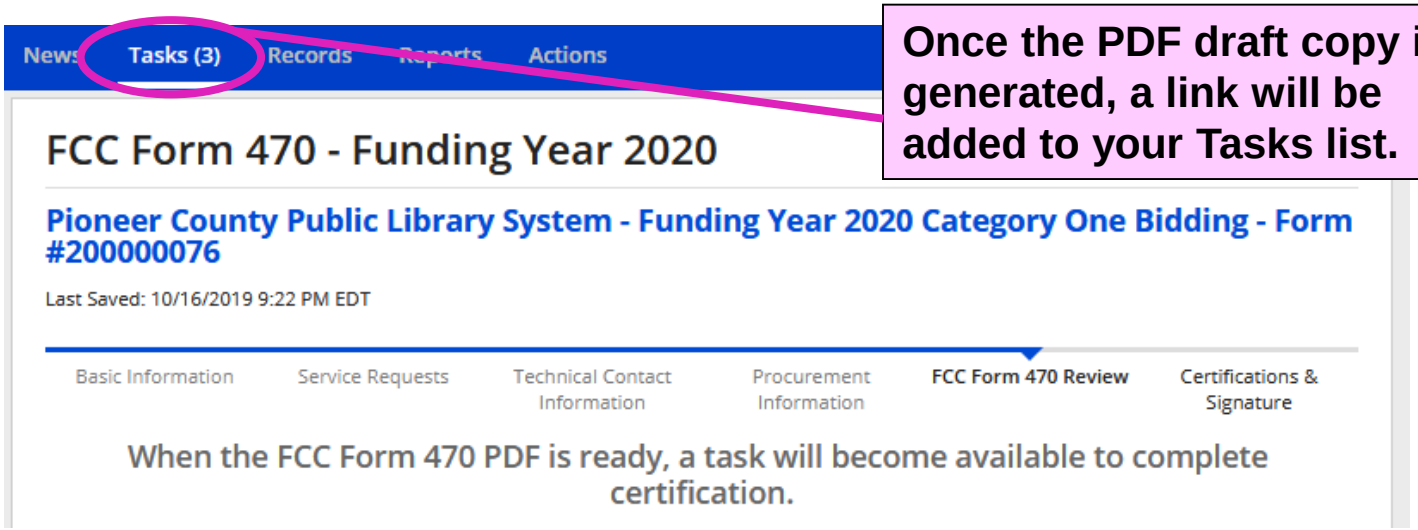
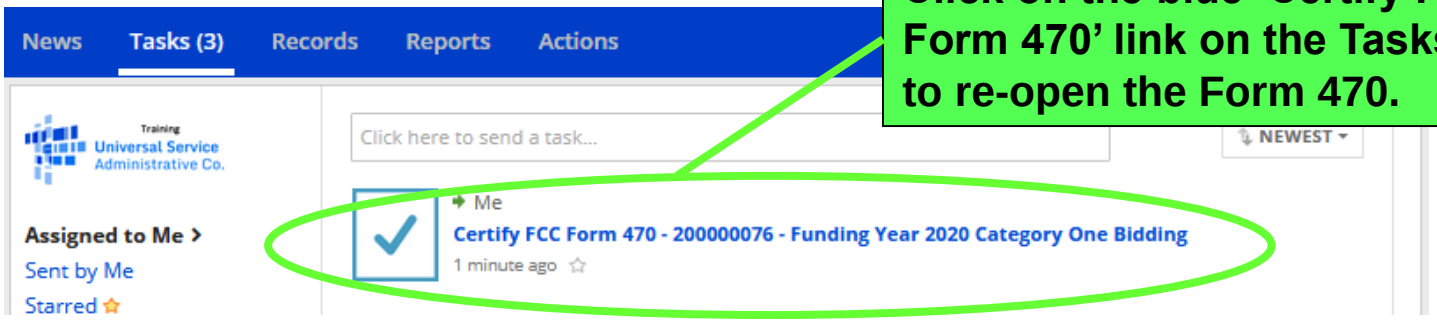
REVIEW YOUR FORM 470

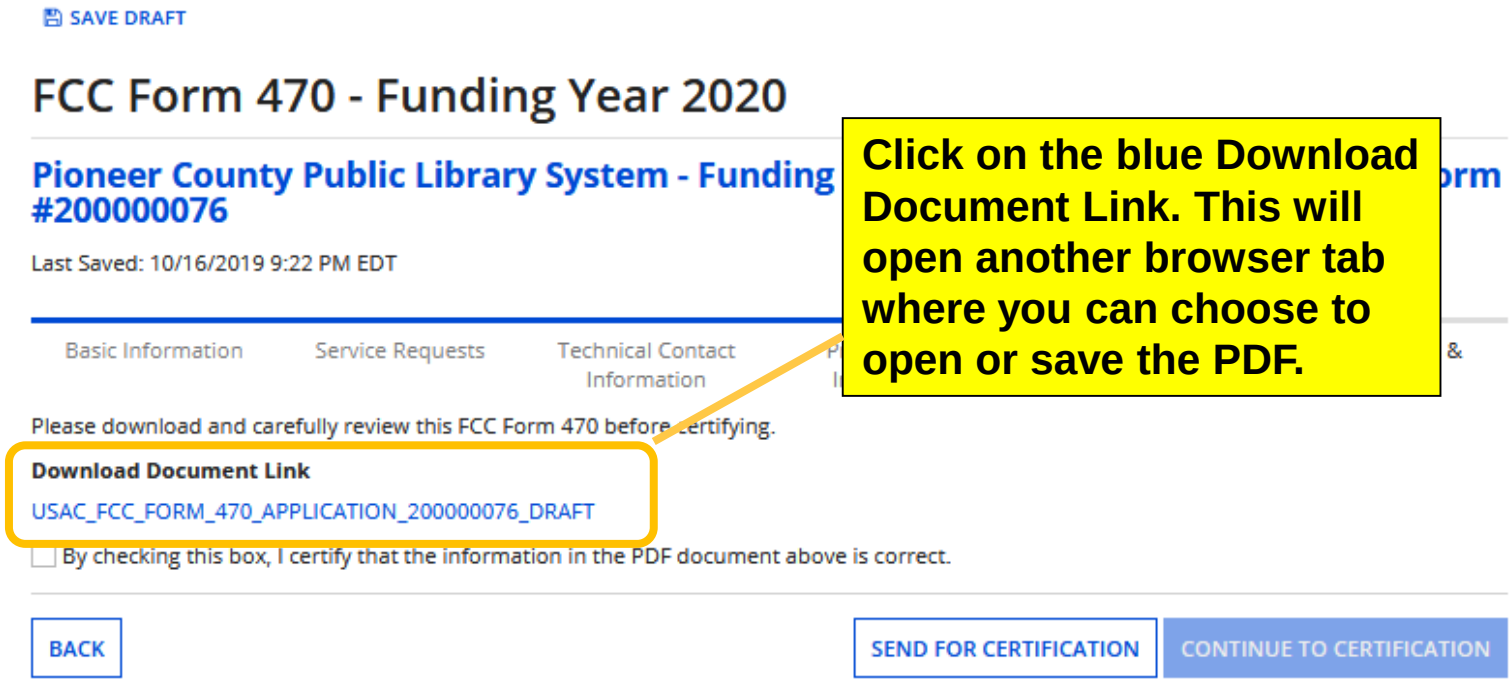


Once the PDF draft copy is generated, a link will be added to your Tasks list.

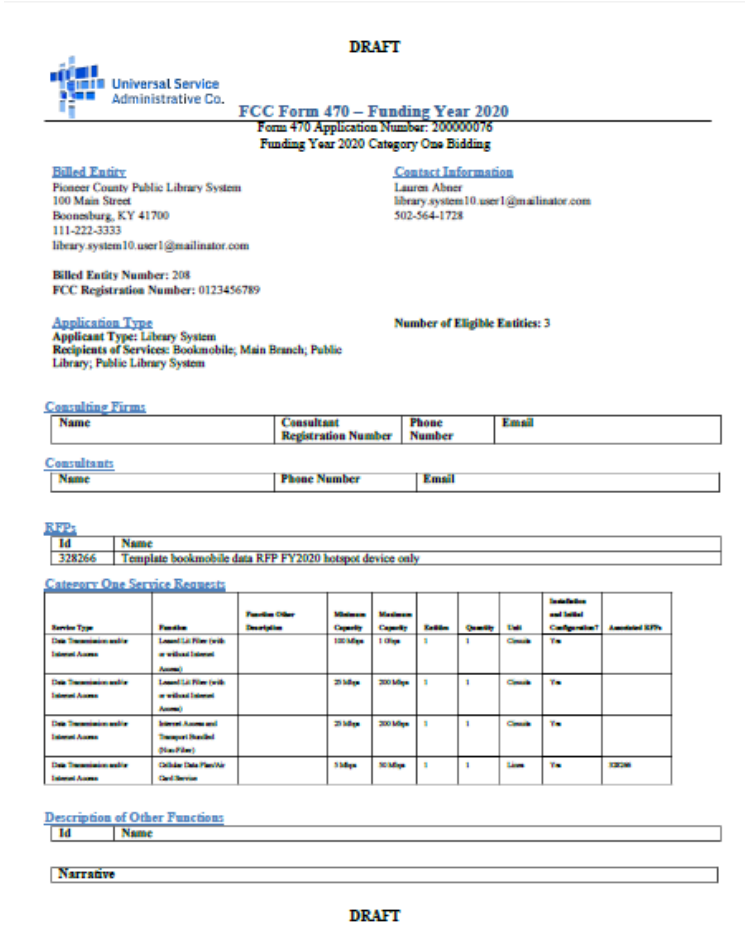


Click on the blue 'Certify FCC Form 470' link on the Tasks list to re-open the Form 470.

DOWNLOAD DRAFT PDF COPY



EMAIL THE DRAFT TO KDLA



DRAFT

Universal Service Administrative Co.

FCC Form 470 – Funding Year 2020
Form 470 Application Number: 200000076
Funding Year 2020 Category One Bidding

Billed Entity
Pioneer County Public Library System
100 Main Street
Boonesburg, KY 41700
111-222-3333
library.system10.user1@mailinator.com

Billed Entity Number: 208
FCC Registration Number: 0123456789

Contact Information
Lauren Abner
library.system10.user1@mailinator.com
502-564-1728

Application Type
Applicant Type: Library System
Recipients of Services: Bookmobile; Main Branch; Public Library; Public Library System

Number of Eligible Entities: 3

Consulting Firms

Name	Consultant Registration Number	Phone Number	Email

Consultants

Name	Phone Number	Email

RFPs

Id	Name
328266	Template bookmobile data RFP FY2020 hotspot device only

Category One Service Requests

Service Type	Function	Function Other Description	Minimum Capacity	Maximum Capacity	Entities	Quantity	Unit	Installation and Initial Configuration?	Associated RFPs
Data Transmission and/or Internet Access	Leased Lit Fiber (with or without Internet Access)		100 Mbps	1 Gbps	1	1	Circuits	Yes	
Data Transmission and/or Internet Access	Leased Lit Fiber (with or without Internet Access)		25 Mbps	200 Mbps	1	1	Circuits	Yes	
Data Transmission and/or Internet Access	Internet Access and Transport Bundled (Non-Fiber)		25 Mbps	200 Mbps	1	1	Circuits	Yes	
Data Transmission and/or Internet Access	Cellular Data Plan/Air Card Service		5 Mbps	50 Mbps	1	1	Lines	Yes	328266

Description of Other Functions

Id	Name

Narrative

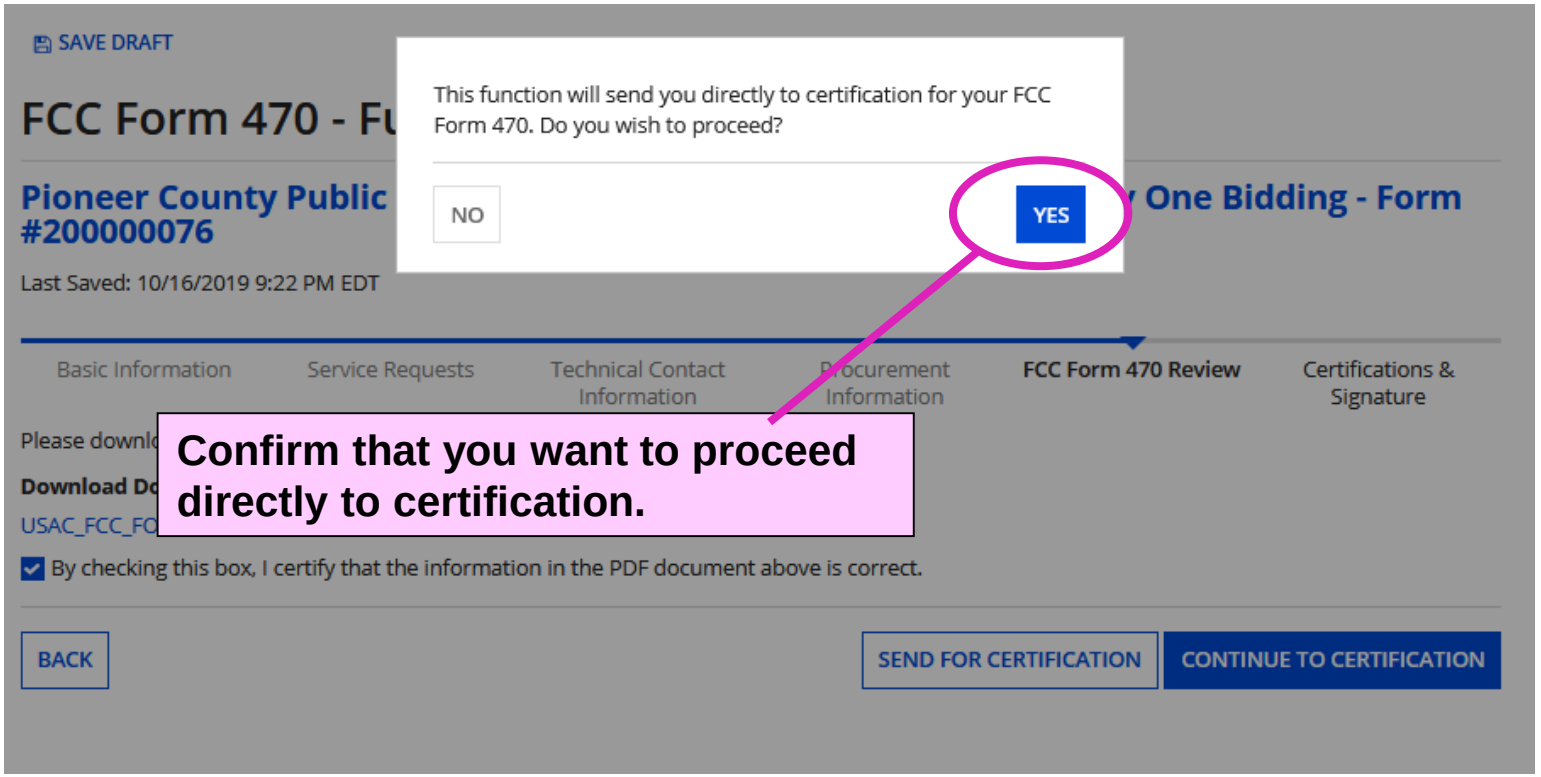
DRAFT

Draft 470s and RFP documents can be emailed to lauren.abner@ky.gov for review.

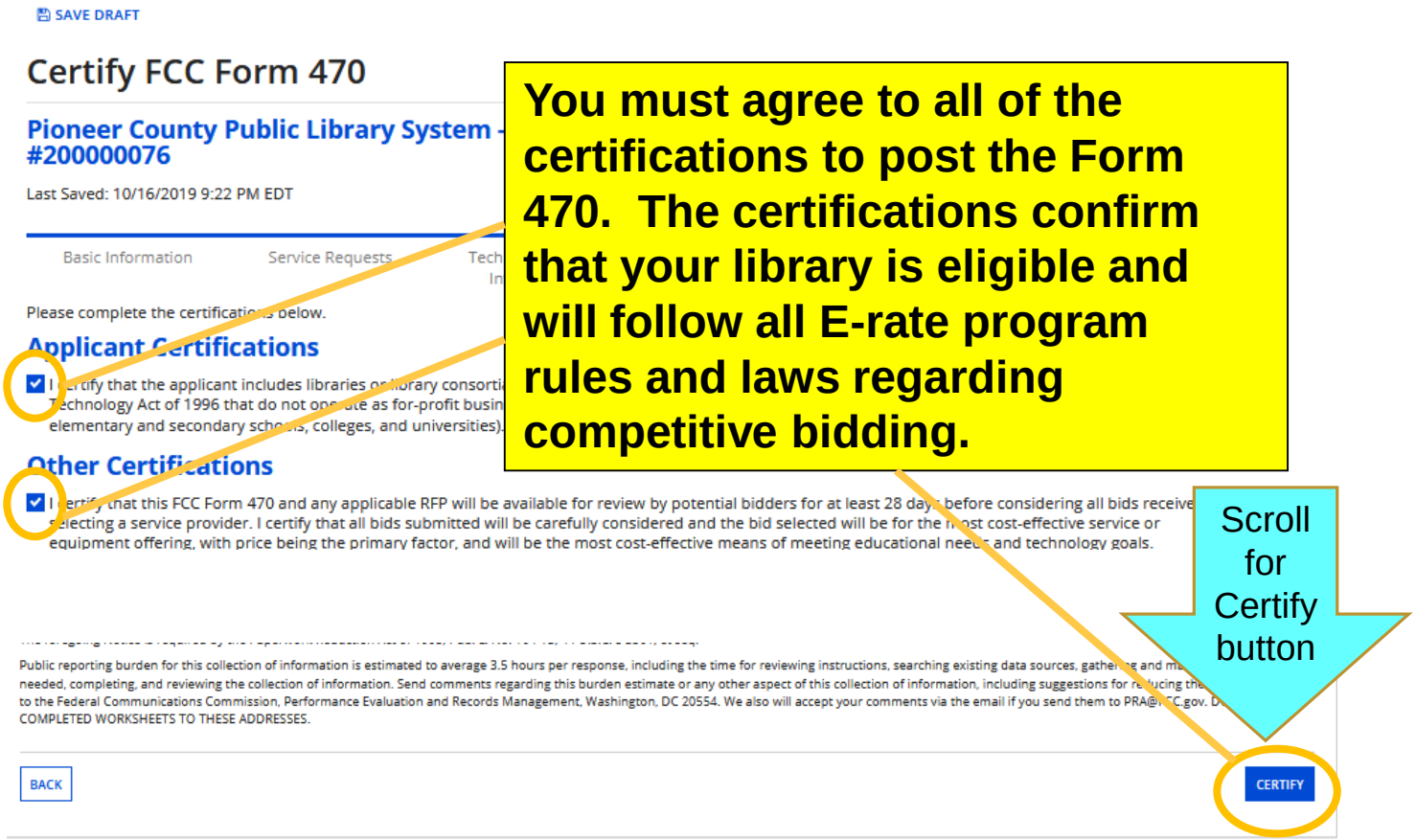
You don't need to save the draft copy for your records; you'll be able to download the final, certified copy later.

CONTINUE TO CERTIFICATION

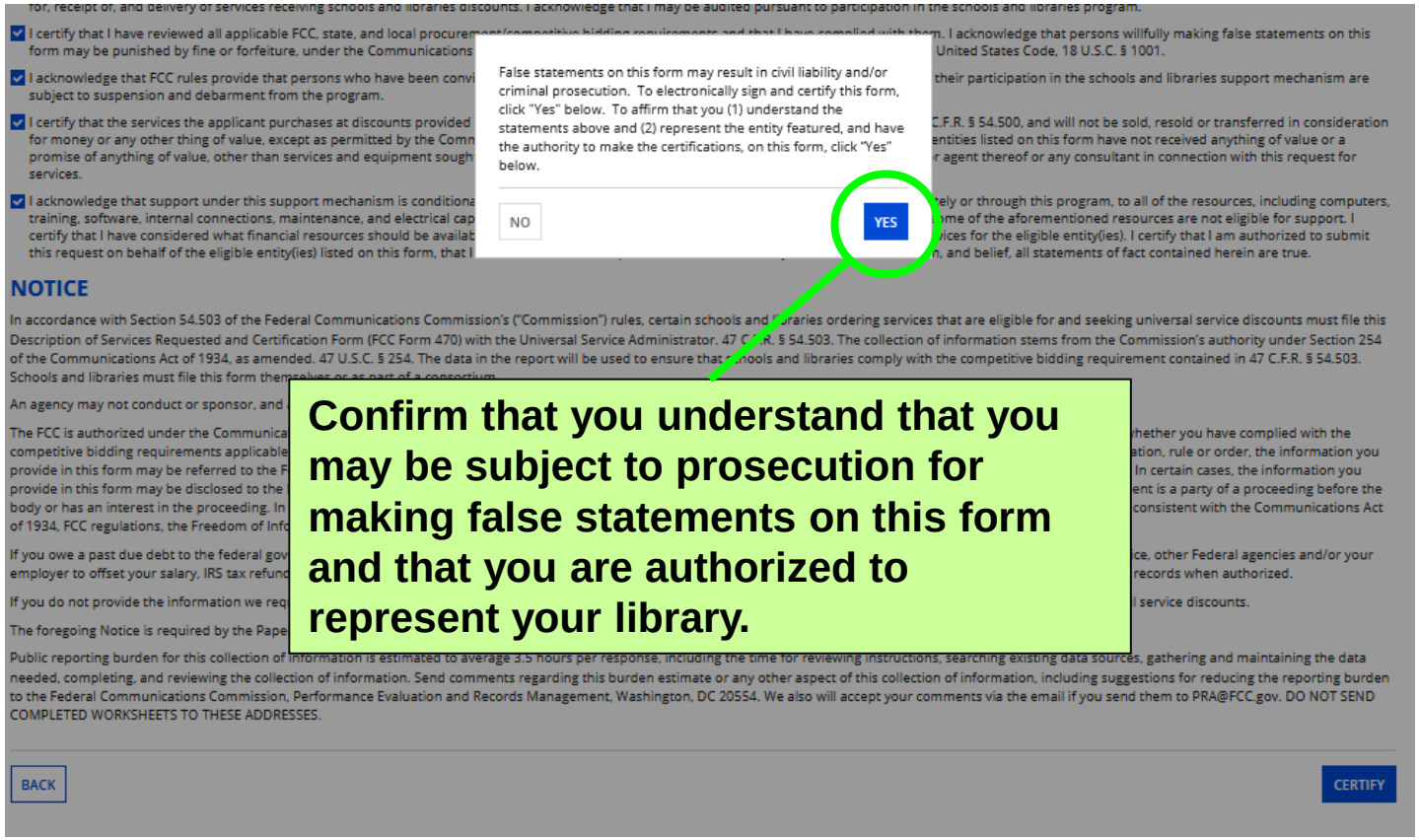
YES TO PROCEED



CHECK CERTIFICATIONS

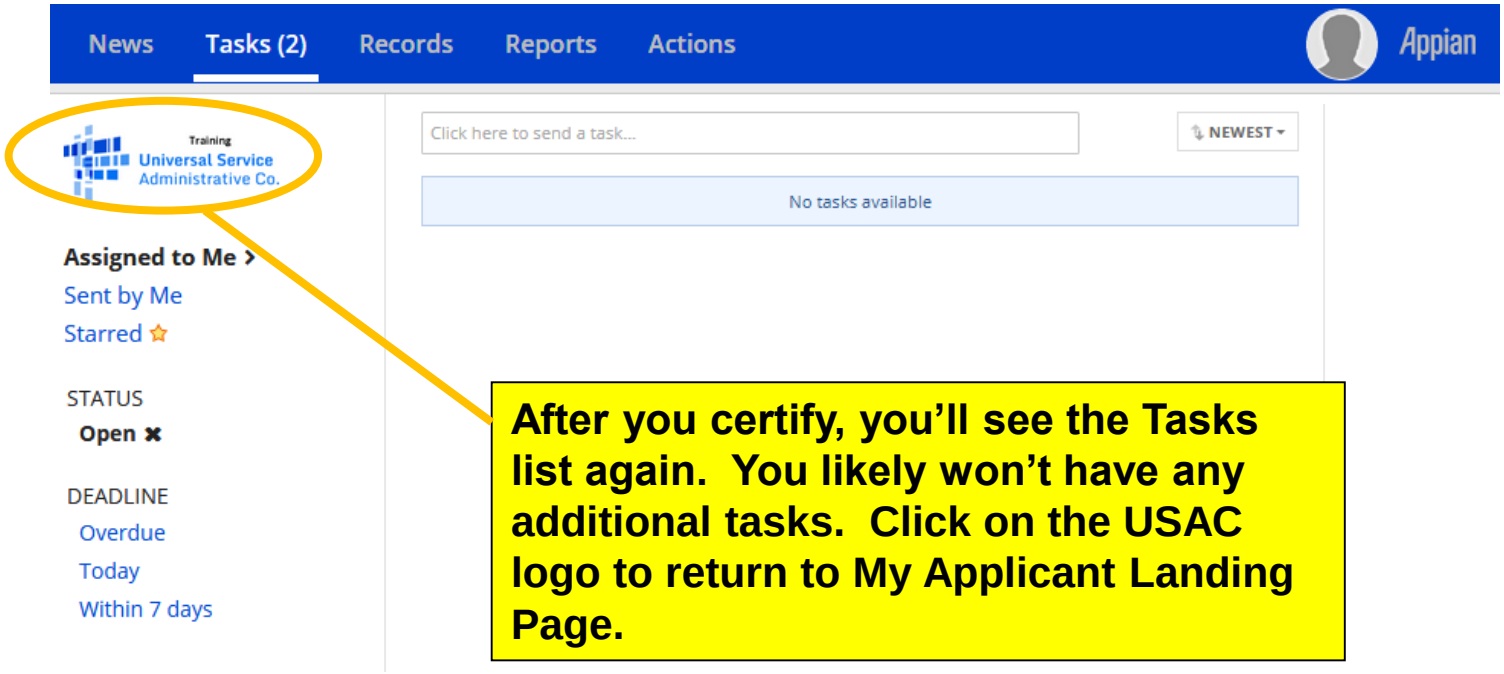


CERTIFICATION - WARNING

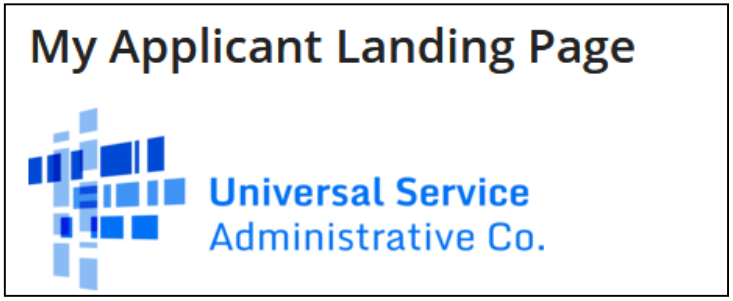


Confirm that you understand that you may be subject to prosecution for making false statements on this form and that you are authorized to represent your library.

BACK TO MY LANDING PAGE

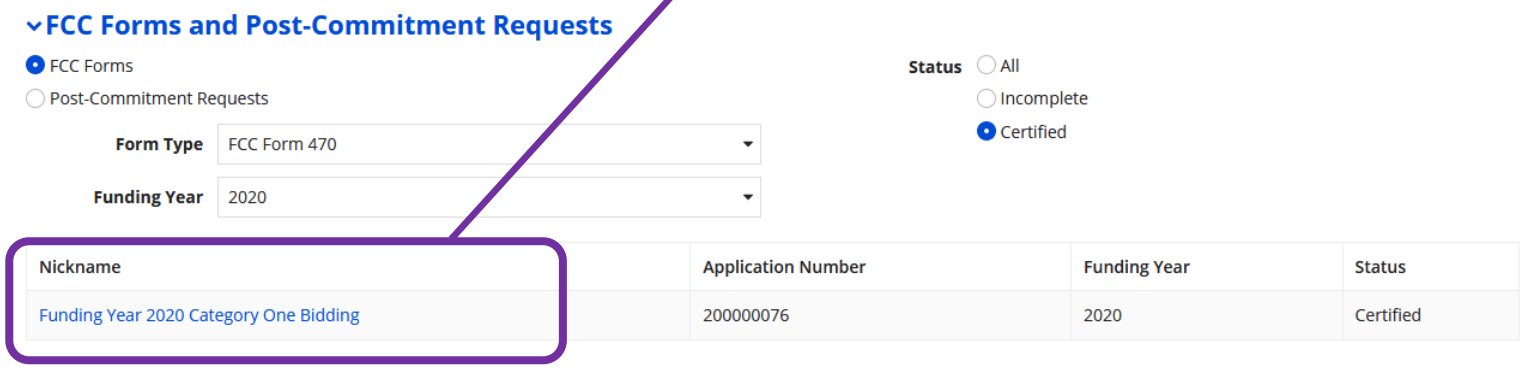


VIEW YOUR CERTIFIED FORM

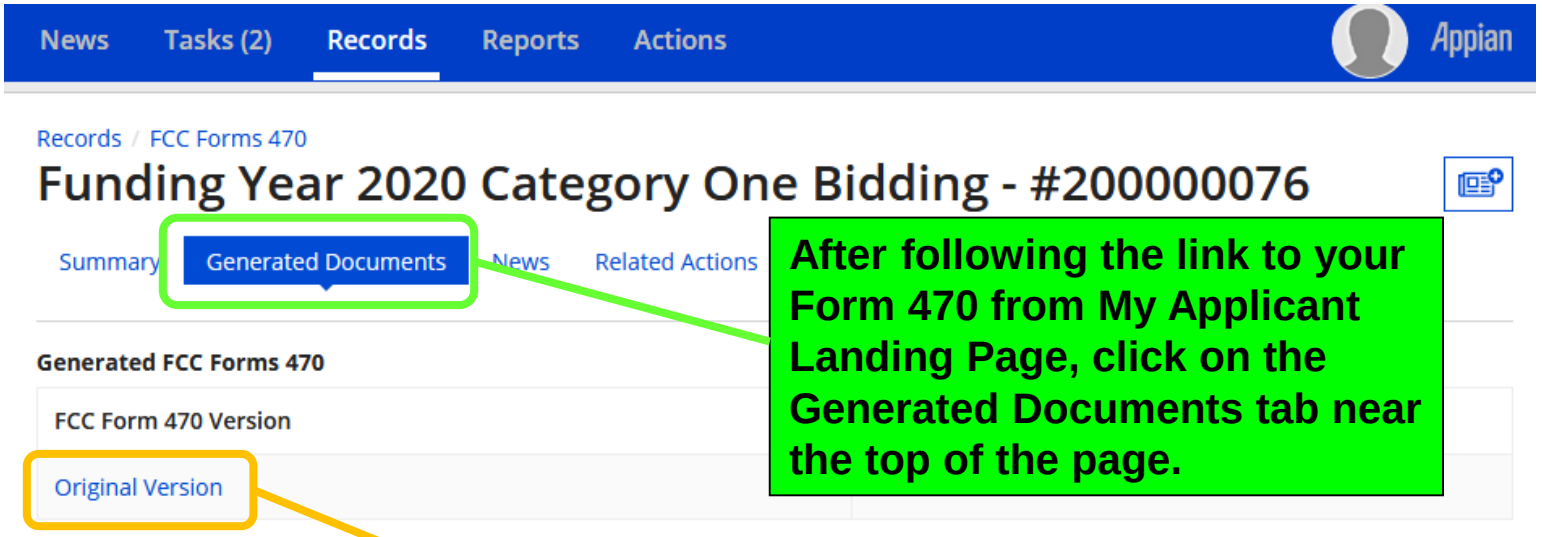


Scroll to bottom

Your in-process and certified Forms 470 are listed at the bottom of My Applicant Landing Page. Form Type drop-down: select FCC Form 470. Funding Year drop-down: select 2020. In the far left column, click on the nickname to view the form.



PRINT YOUR FORM 470



After following the link to your Form 470 from My Applicant Landing Page, click on the Generated Documents tab near the top of the page.

The Original Version link opens a PDF copy of the form as it appeared when you certified it. If you have to upload an addendum to RFP documents (like answers to vendor questions), then you'll also see a Current Version link on this page.

ALLOWABLE CONTRACT DATE & BID EVALUATIONS

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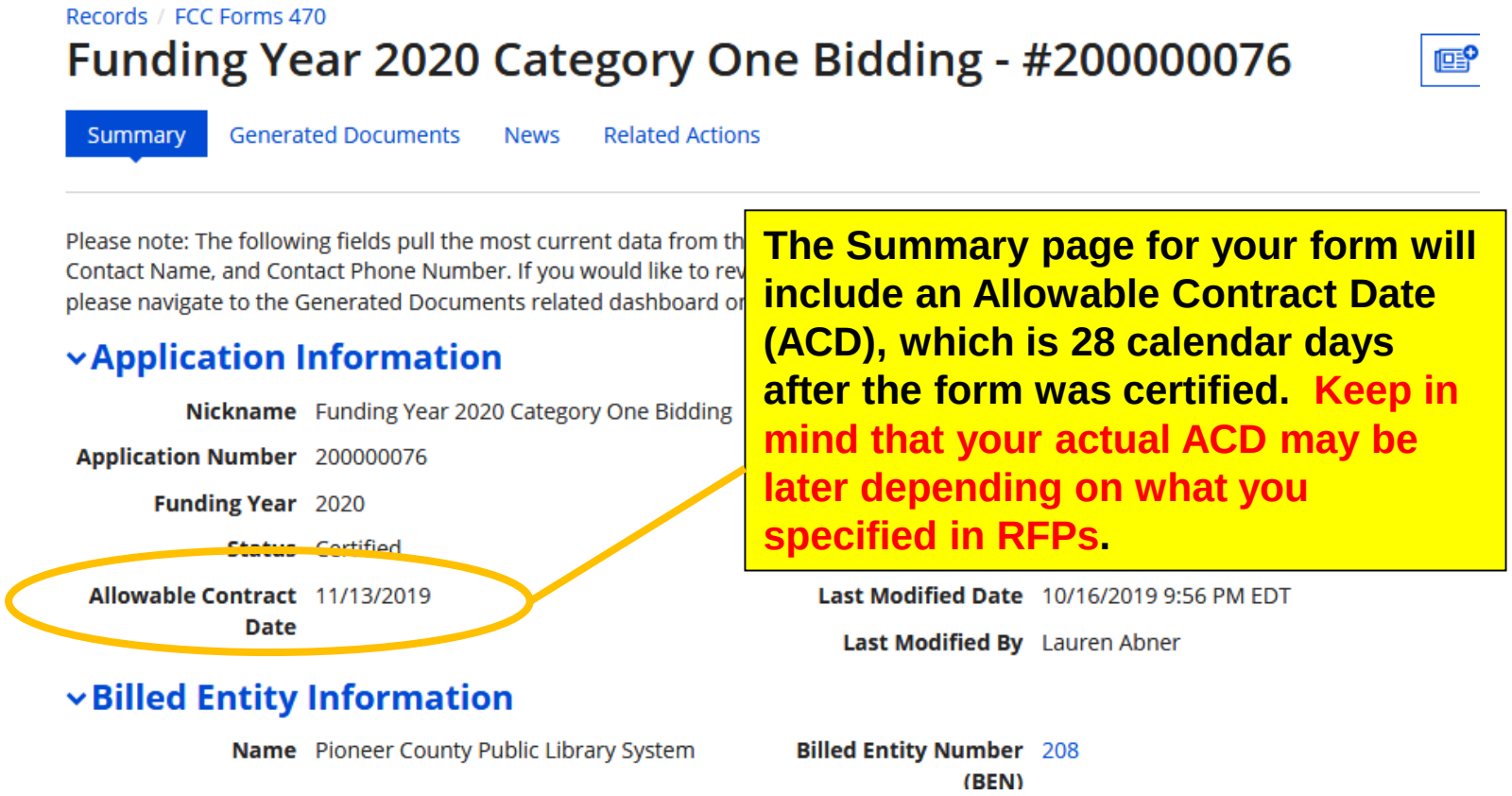
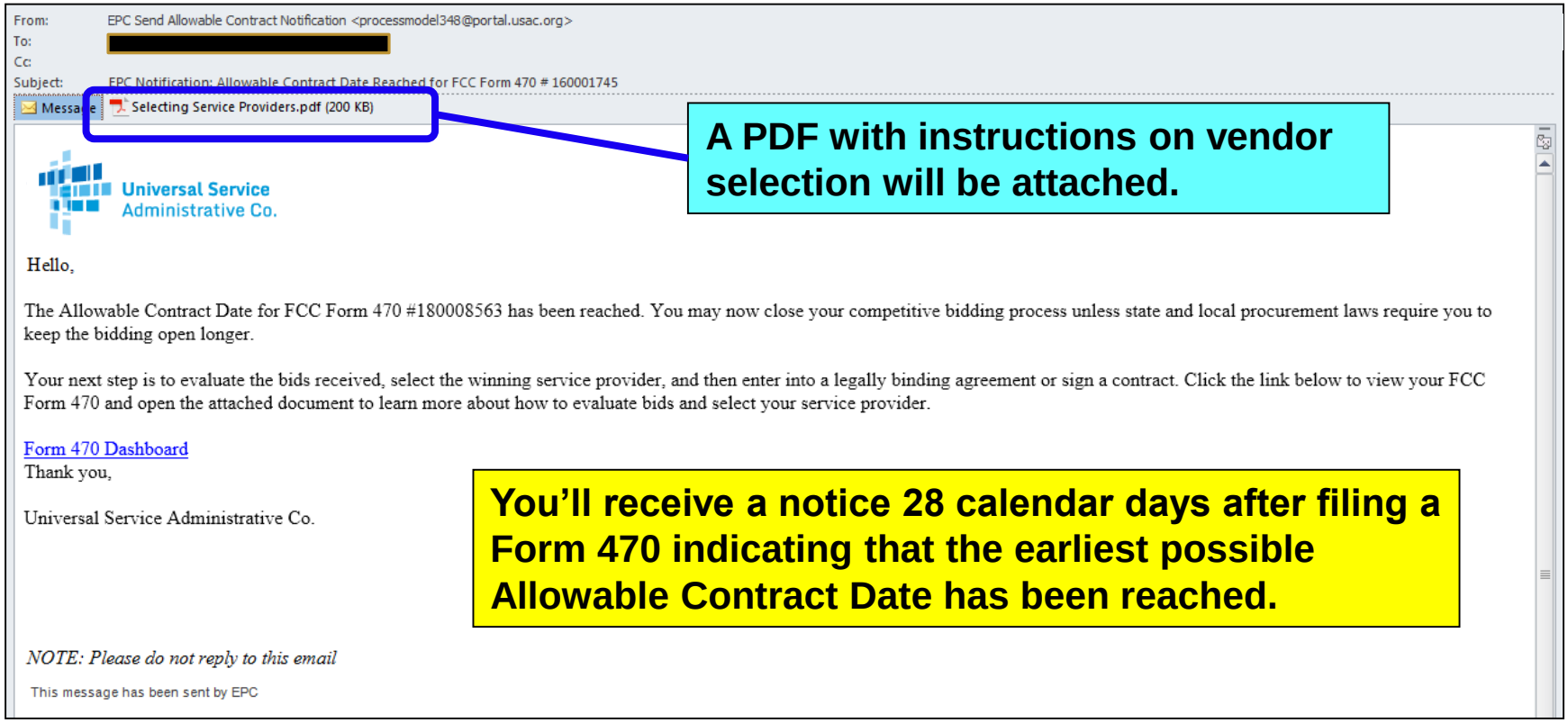
ALLOWABLE CONTRACT DATE



USAC EMAIL FOR ALLOWABLE CONTRACT DATE



BID EVALUATIONS (1/2)

Don’t make any decisions or sign contracts until your Allowable Contract Date (ACD) has passed

- Unless your narrative or RFP specified a due date, you may continue collecting bids after 28 calendar days
- If you received only 1 bid, then you should email yourself to memorialize this fact.
- If you contact vendors to request cost proposals after you file your Form 470 – do not give those vendors additional information not listed in the narrative or RFP.

BID EVALUATIONS (2/2)

Must evaluate all valid bids using E-rate eligible cost as the primary factor

- You should reply to requests for additional information needed to create a responsive bid. Be careful about changing the scope of your requests (ex: adding new locations for service)—that could force you to restart competitive bidding for another 28 days.
- Spam – generic email asking you to call or email to request a quote – is not considered a responsive bid and you don't have to reply.
- You may disqualify certain bids if you stated those disqualification factors on the Form 470.
- You may consider relevant State Master Contracts as bids – while public libraries may purchase internet services from the KIH3 contract, they are NOT eligible to purchase off the KETS network equipment contracts for Kentucky schools.

Sample Bid Evaluation Matrix

Hover over each paragraph on the right to see the area of the bid evaluation matrix with which it corresponds.

FACTOR	POINTS AVAILABLE	VENDOR 1	VENDOR 2	VENDOR 3
Price of the eligible products and services	30*	15	30	25
Prior experience with the vendor	20	20	0	20
Prices for ineligible services, products, and fees	25	20	15	25
Flexible invoicing: FCC Form 472 or FCC Form 474	15	0	15	15
Local or in-state vendor	10	10	8	7
TOTAL	100	65	68	92

*This number must be higher than all other numbers in the same column.

List of Disqualified Bidders:

Vendor 1

Reason for disqualification: All interested bidders received two weeks' notice of a required pre-bid conference. Vendor 1 did not attend this conference and did not provide a reason for their absence.

Important things to note about this sample:

The price of the eligible products and services must be the most heavily weighted factor. This means that it must have the highest number of "Points Available."

Vendors are rated on how well they meet each factor. Point values for all factors are totaled for each vendor.

In this sample, Vendor 3, with a total of 92 points, is the winning bid because that vendor has the highest total points.

If a bidder is disqualified, the reason for disqualification should be noted for that vendor (see the "List of Disqualified Bidders" below the matrix).

For more information on constructing a bid evaluation, visit the USAC website at: http://usac.org/sl/applicants/step02/default.aspx

http://www.usac.org/_res/documents/sl/pdf/samples/Bid-Evaluation-Matrix.pdf

SAMPLE BID MATRIX – E-RATE CENTRAL

- E-rate Central, an E-rate consulting firm, has a sample bid evaluation matrix: http://e-ratecentral.com/applicationTips/bidAssessment/CompetitiveBidResponseDocumentation.asp
- KDLA neither recommends nor discourages applicants to use this particular bid matrix, but it does provide an example of how to track incoming bids and organize bid evaluations for several products/services by using multiple tabs on an Excel spreadsheet. Applicants have to modify the spreadsheet to reflect the factors important to their situation.

DOCUMENT RETENTION – SAVE IT ALL!

- Save **everything** related to E-rate filing. The document retention period is **10 years from the last date for service in the funding year**.
  - FCC Forms
  - Any correspondence from USAC or the FCC.
  - Copies of all responsive bids (not just the winning bid)
  - Contracts or agreements with service providers
  - Copies of bid evaluation form/decision process for choosing winning bid
  - Invoices and proof of delivery, service, etc.

LOOKING AHEAD – THE FORM 471

- The Form 471 for Funding Year 2020 will likely be released around January 10, 2020 (TBA).
- Prior to filing the Form 471, you must complete the competitive bidding process and sign a contract or make a legally-binding agreement with the vendor chosen through the bidding process.
- KDLA will provide updated Form 471 training in January 2020 – dates TBA.

WRAP-UP

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RESOURCES

KDLA's E-rate page

- https://kdla.ky.gov/librarians/programs/e-rate/Pages/default.aspx

USAC Schools & Libraries homepage

- www.usac.org/sl

USAC Client Service Bureau

- 1-888-203-8100 or through your E-rate Productivity Center account

E-rate Central

- https://e-ratecentral.com/

SIGN UP FOR KYTECH LISTSERV®

For Library Technology Support Staff:

- KYTECH is a monitored discussion list devoted to those who work with technology for their library. By using this LISTSERV®, individuals from around the state will have the chance to ask questions, share ideas, voice concerns, and make valuable contacts all through their e-mail.
- TO SUBSCRIBE: Send a blank message to: join-kytech@listserv.ky.gov

E-rate updates and reminders are posted to KYTECH.

For E-rate questions or for assistance with filing forms, please contact KDLA.

Lauren Abner
Technology Consultant
lauren.abner@ky.gov
(502) 564-1728

Please complete KDLA's survey:
https://www.surveymonkey.com/r/ErateForm470CatOneFY2020

INSTITUTE of Museum and Library SERVICES

KDLA's E-rate support is funded in part by the IMLS Grants to States program.

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